The IDEXX Cornerstone* Practice Management System

Cornerstone 8.2 What's New

IDEXX LABORATORIES

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Preface

Getting Started

Welcome! To help ensure a smooth transition to your new IDEXX Cornerstone* 8.2 software, we recommend using the following resources in the order listed below.

1	**Release Implementation Plan**	Get started by reviewing a checklist of all pre-installation tasks to help you prepare for and take advantage of the new features in this release.
2	**What's New (this document)**	View detailed information on setting up and using the new features and functionality in this release.
3	**Installation Guide**	Review hardware/operating system guidelines and follow the recommended steps for installation.
4	**Release Implementation Plan**	Reference this plan once again to review post-installation tasks, including security setup and defaults configuration.

To access these resources, visit the new **Cornerstone Resource Library** available on IDEXX.com at idexx.com/cornerstoneresources.

About This Document

This document provides information on the new features and functionality in the IDEXX Cornerstone 8.2 software. It includes key information needed to set up and use new features and provides examples of the new windows available in the Cornerstone 8.2 software.

Before using this document, be sure to reference the *Cornerstone 8.2 Release Implementation Plan* to review pre-installation information and make decisions on the new features you plan to implement in your practice. You can then use this *Cornerstone 8.2 What's New* document to learn about the features that apply to your practice's specific feature implementation goals.

Intended Audience

This document is for experienced users of the Cornerstone software and assumes that you have a good working knowledge of an earlier release. If you are new to the software, you should review the reference material and training documents available online at idexx.com/cornerstoneresources.

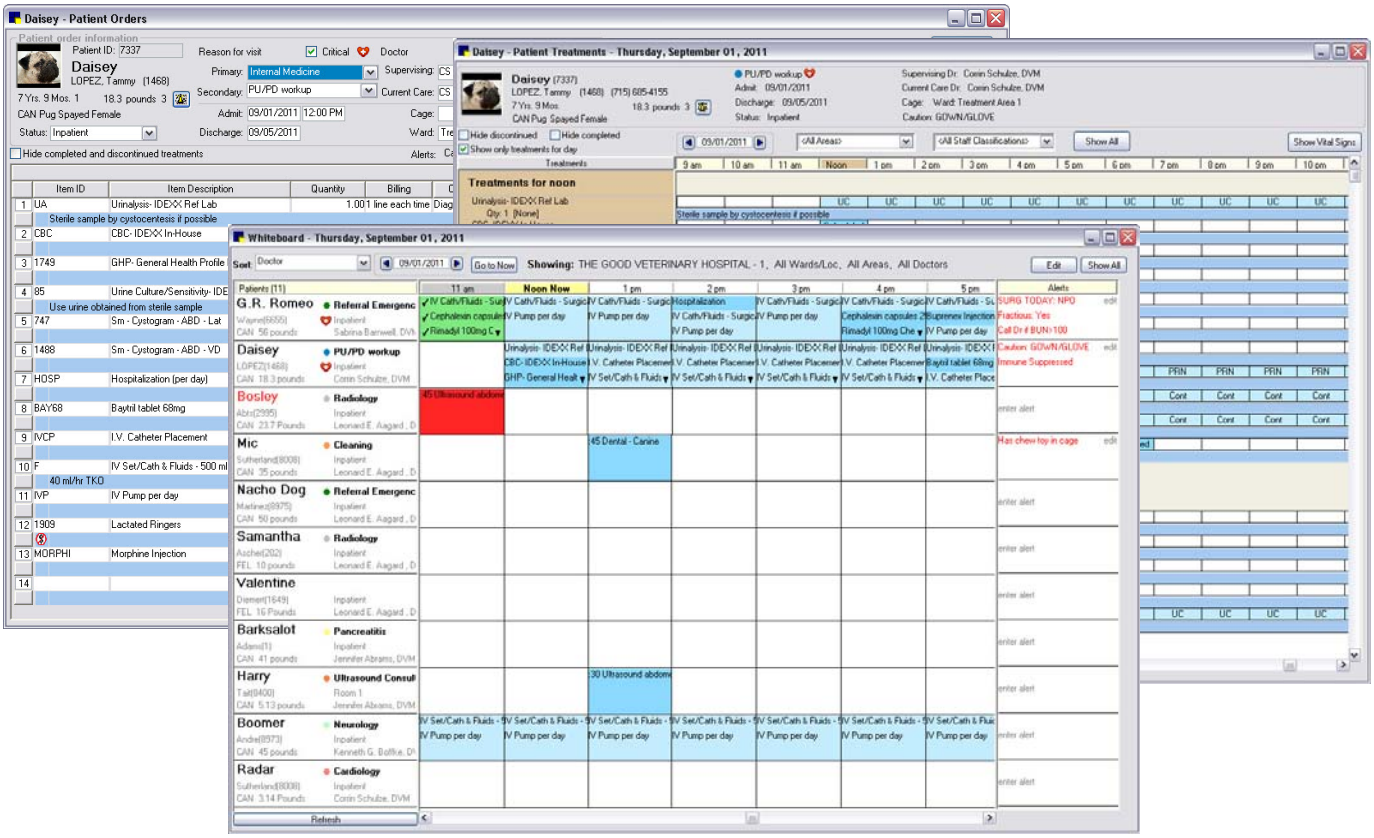
Note: After installing Cornerstone 8.2, a Cornerstone Administrator will need to adjust security settings for your practice so that staff members can access the new features. See the *Cornerstone 8.2 Release Implementation Plan* for a listing of these security settings.

Electronic Whiteboard

Overview

The Electronic Whiteboard encompasses three windows (Patient Orders, Whiteboard and Patient Treatments) that work in conjunction to provide you with a comprehensive solution for ordering, tracking and processing patient treatments within the hospital. In Cornerstone* 8.2, the Electronic Whiteboard windows provide improved display options, faster access to information, and a "smarter" patient treatment ordering process with the following enhancements:

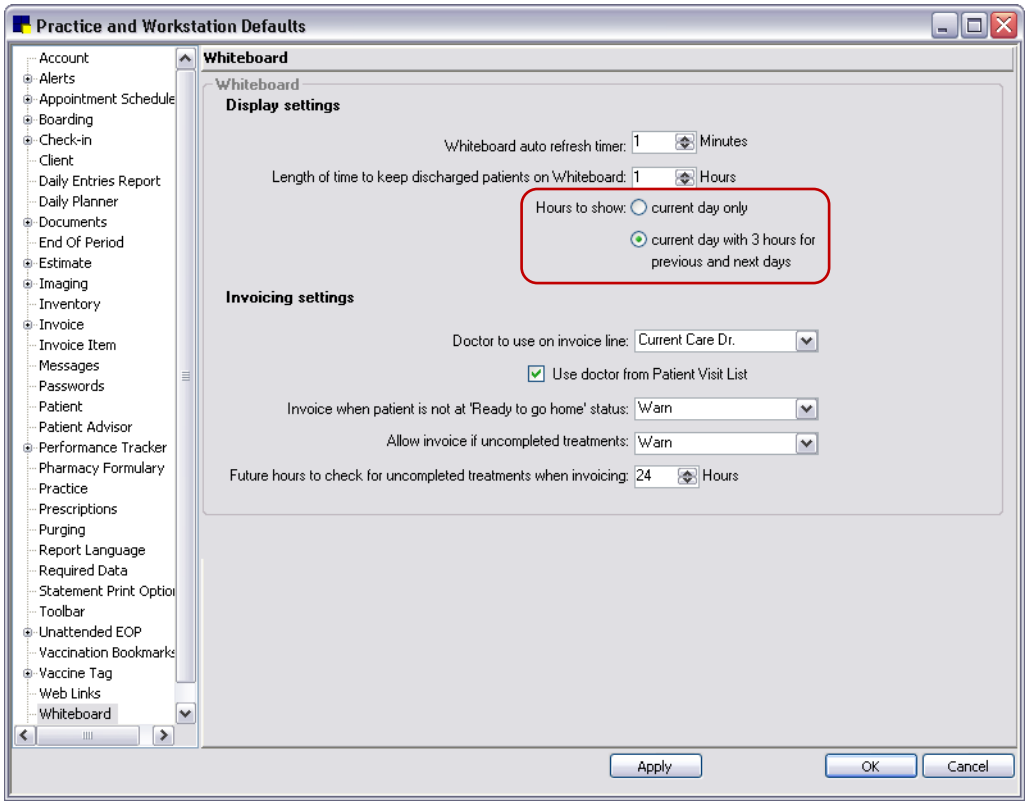
- Improved display of patient and treatment information for at-a-glance scanning
  - Ability to view and set the display order for patient treatments
  - New Secondary Reason for Visit field, allowing you to provide more detail on the specific problem or procedure associated with the patient's visit
  - Expanded treatment frequency options, with added ability to schedule treatments using incremental (on-the-minute) time scheduling
  - New "hours to show" display options that allow staff to look back to the previous day and look ahead to the next day without changing the date
  - New icons designating critical patients and non-billable items
- Faster entry of patient treatment orders with new defaults and field-level rules that can be set for each patient orders invoice item (either individually or many at a time)
- New Whiteboard Alerts List, with the ability to add and view multiple types of patient alerts



Setup

"Hours to Show" Option in Whiteboard Defaults

The Whiteboard defaults have been reorganized into a *Display settings* area and an *Invoicing settings* area. In addition, a new **Hours to show** setting has been added to allow you to set a default for the number of hours to show on the Whiteboard (main grid) window.



Hours to show options include:

- **Current day only –** Includes 24 one-hour columns on the Whiteboard window.
- **Current day with 3 hours for previous and next days –** Includes 24 one-hour columns, with 3 one-hour columns added before and after this 24-hour period. This option adds **<< Previous** and **Next >>** links that display when you scroll horizontally to the outer limits of the displayed hour columns. You can click the appropriate link to move the grid columns to change the date and display the hours for the previous day or next day.

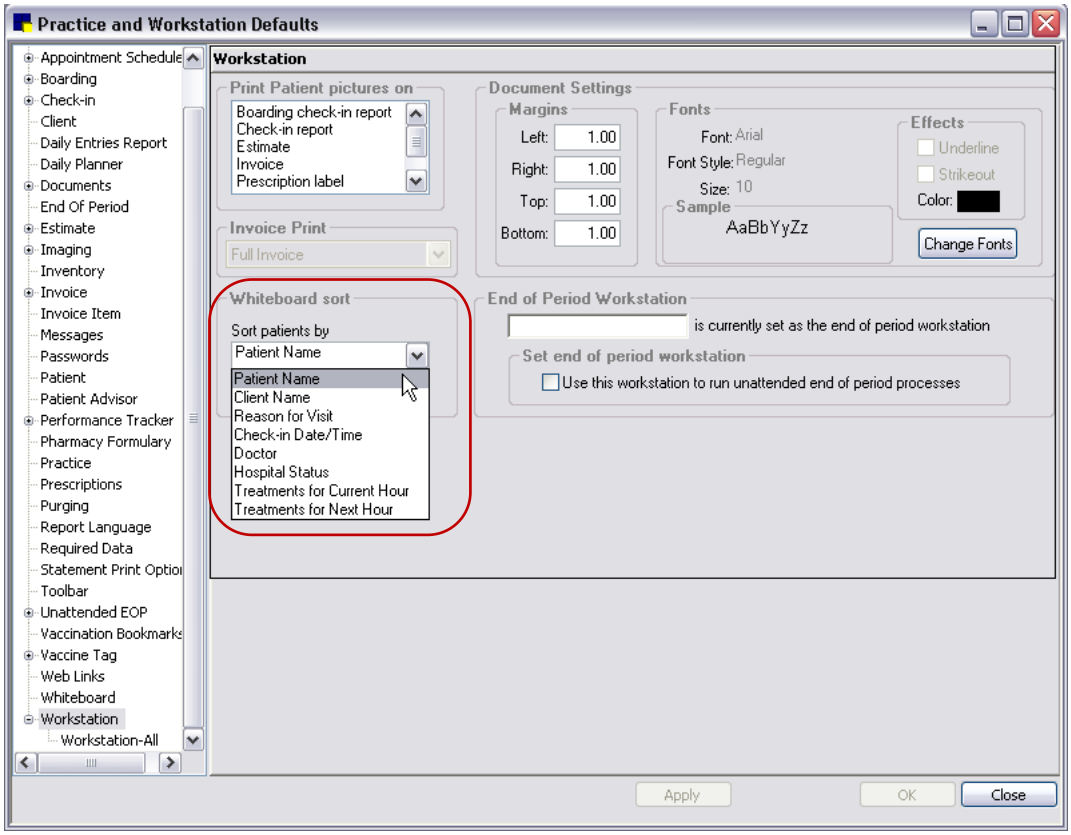
  This ability to see into the next day without manually changing the date is helpful for preparing for the next day and especially useful for 24-hour clinics.

Note: For both **Hours to show** options, the number of columns visible at one time without scrolling depends on the monitor size.

"Whiteboard Sort" Option in Workstation Defaults

You can now specify a default sort order for the Whiteboard **Patients** column on each workstation (e.g., Boarding may want a different default sort order than ICU).

Note: If a sort order is not specified here, the column is sorted by Patient Name (as it was in earlier versions).



Note: You can also change the **Patients** column sort order at any time directly on the Whiteboard using the new **Sort** drop-down list.

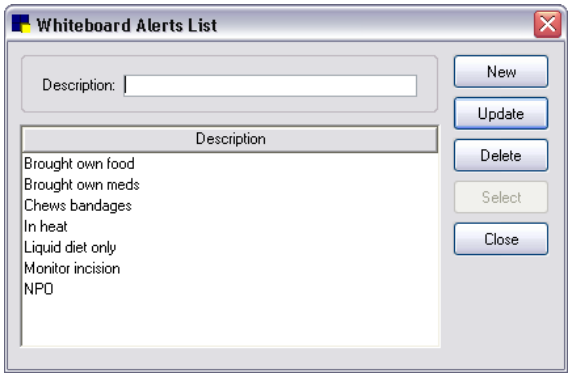
Setting Up and Selecting Alerts to Display on the Whiteboard

In Cornerstone 8.2, you can create a Whiteboard Alerts List to display patient alerts in the new **Alerts** column on the Whiteboard. You can also designate specific Patient Prompts and Patient Classifications to display as alerts on the Electronic Whiteboard windows.

Whiteboard Alerts List

The new Whiteboard Alerts List (**Lists > Electronic Whiteboard > Alerts**) allows your practice to create a list of commonly used hospitalized patient alerts to be displayed on the Whiteboard for the current visit.

Note: Whiteboard alerts can also be free-form typed for each patient at the time of use as needed.



To create a Whiteboard alert, on the Whiteboard Alerts List dialog box, click **New** and type the alert text as you want it to display at the time of use on the Electronic Whiteboard windows.

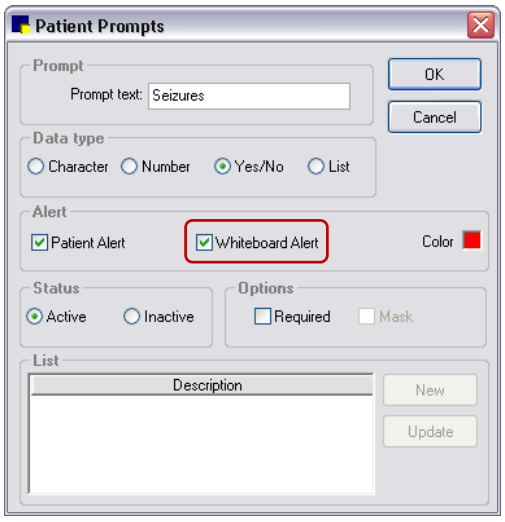
Examples:

NPO
Liquid diet only
Monitor incision
Surgery today
In heat
Chews bandages
Brought own meds
Brought own food

See “Alerts Column” on page 19 to see an example of how these alerts display on the Whiteboard at the time of use.

Patient Prompts – Whiteboard Alert Option Added

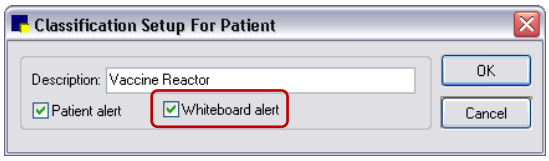
You can designate certain Patient Prompts (**Controls > User Defined Prompts > Patient** tab) to display on the Electronic Whiteboard windows.



To designate a prompt to display as an alert on the Electronic Whiteboard windows, update the prompt and select its **Whiteboard Alert** check box. If desired, select a color for the alert text by clicking on the colored square and then selecting a color or defining a custom color.

Patient Classifications – Whiteboard Alert Option Added

You can designate certain Patient Classifications (**Controls > Classifications > Patient** tab) to display on the Electronic Whiteboard windows.

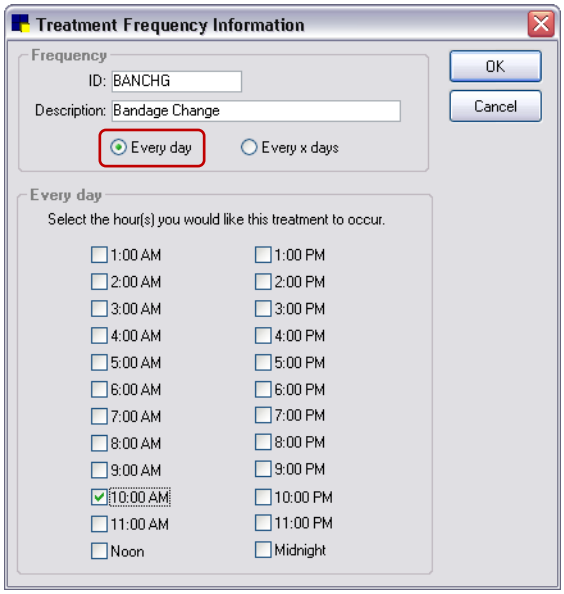


To designate a classification to display as an alert on the Electronic Whiteboard windows, update the classification and select its **Whiteboard alert** check box.

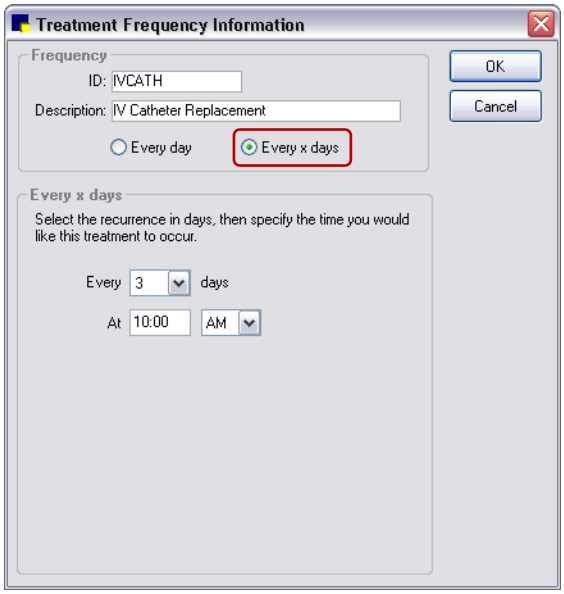
Treatment Frequencies – Options for "Every Day" and "Every X Days"

The Treatment Frequency List (**Lists > Electronic Whiteboard > Frequencies**) now allows you to set up treatment frequencies to occur **Every day** or **Every x days**. The frequencies set up here display as options in the **Frequency** field on the Patient Orders window when adding treatment orders for a patient.

To set up an **Every day** frequency, select this option and then select the hours you would like this treatment to occur:

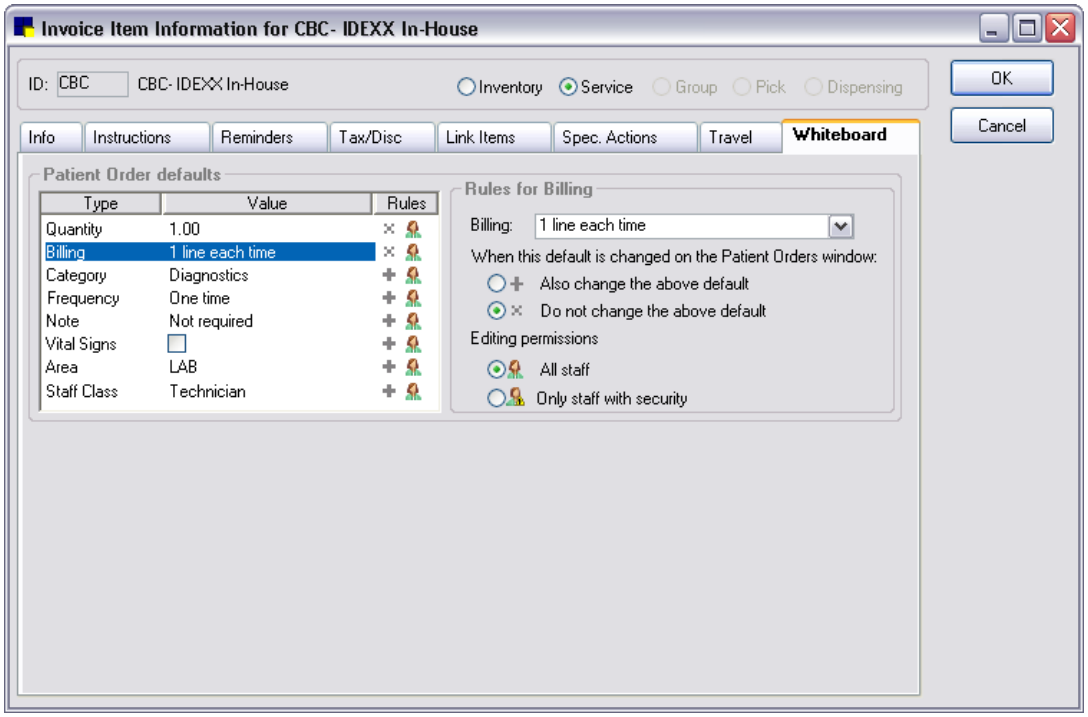


To set up an **Every x days** frequency, select this option, select a recurrence of every 2 to 7 days, and then specify the time you would like the treatment to occur on those days:



Invoice Item Information Window – Whiteboard Tab for Setting Patient Order Item Defaults

The Invoice Item Information window's new **Whiteboard** tab allows you to set default values and field-level rules for each invoice item that staff may enter on the Patient Orders window.



Select a Patient Order field in the list on the left to display its associated rules on the right.

Overview of Fields on the Whiteboard Tab

Patient Order defaults list (left side of **Whiteboard** tab)

- **Type column –** The name of the Patient Order item field as it appears in its associated column on the Patient Orders window.
- **Value column –** The default value to use for this field on the Patient Orders window.
- **Rules column –** Icons in this column indicate the current "change rules" set for this field. See the corresponding field explanations below for information on these icons.

Rules for [selected field type] area (right side of **Whiteboard** tab)

- **[Field type] default –** Depending on the field type selected on the left, a drop-down list, text box or check box may display, allowing you to specify the default value for this Patient Orders item field. If you want to require staff to enter or select the value at the time the order item is added on the Patient Orders window, set the default value to **<Blank>**.
- **When this default is changed on the Patient Orders window –** Allows you to select one of the following "change rules" to be followed when this value is changed on the Patient Orders window:
  - **Also change the above default –** When this field's value is changed on the Patient Orders window, Cornerstone will make the changed value the new default value for this field (and automatically update the default value listed on the **Whiteboard** setup tab). For all fields except **Quantity**, this is the option that will be selected by default upon installing Cornerstone 8.2 and when setting up a new invoice item.
  - **Do not change the above default –** When this field's value is changed on the Patient Orders window, Cornerstone will **not** make the changed value the new default value (it will leave the default value as it is listed on the **Whiteboard** setup tab). For the **Quantity** field, this is the option that will be selected by default upon installing Cornerstone 8.2 and when setting up a new invoice item.
- **Editing permissions –** Allows you to select one of the following rules to determine which staff are allowed to edit/overwrite the default value for this field on the Patient Orders window:
  - **All staff may edit –** All staff with Patient Orders permissions are allowed to edit/overwrite the default value for this field on the Patient Orders window, regardless of whether they have been granted Whiteboard Orders Override security permissions. This is the option that will be selected by default upon installing Cornerstone 8.2 and when setting up a new invoice item.
  - **Only staff with security permissions may edit –** Only those staff members with Whiteboard Orders Override security permissions in Cornerstone are allowed to edit/overwrite the default value for this field on the Patient Orders window.

  Note: If a field's default value is set to **<Blank>** on the **Whiteboard** setup tab and therefore appears blank on the Patient Orders window, all staff with Patient Orders permissions are allowed to enter or select a value for this field, regardless of whether they have been granted Whiteboard Orders Override security permissions in Cornerstone.

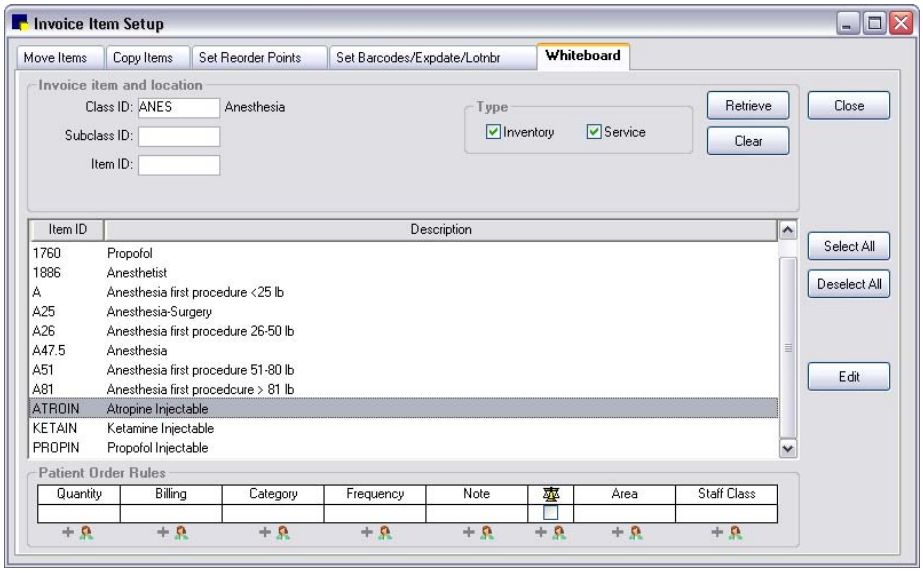
To set up patient order item defaults and change rules on the Whiteboard tab:

1. In the Invoice Item List (**Lists > Invoice Item**), double-click the desired invoice item to update it.
2. Click the **Whiteboard** tab.

3. Select a Patient Order field in the list on the left to display its associated rules on the right.
4. Depending on the field type selected on the left, a drop-down list, text box or check box may display on the right. Specify the desired default value to use for this field in its associated column on the Patient Orders window. If you want to require staff to enter or select the value at the time the item is added to the Patient Orders, set the default value to **<Blank>**.
5. Set the **When this default is changed…** and **Editing permissions** settings for this field. See the **Whiteboard** tab field descriptions provided earlier in this section for information on these settings.
6. Click **OK** to save your changes and close the Invoice Item Information window.
7. Repeat the steps above for each Patient Orders item for which you want to set up defaults and change rules.

Invoice Item Setup Tool's Whiteboard Tab – Setting Patient Order Defaults for Multiple Items

The Invoice Item Setup tool (**Tools > Invoice Item Setup**) is used to set up your invoice items for the first time or to quickly make mass changes to many invoice items simultaneously. In Cornerstone 8.2, the tool's new **Whiteboard** tab allows you to perform a mass-setup of default values and field-level rules for invoice items that staff may enter on the Patient Orders window.

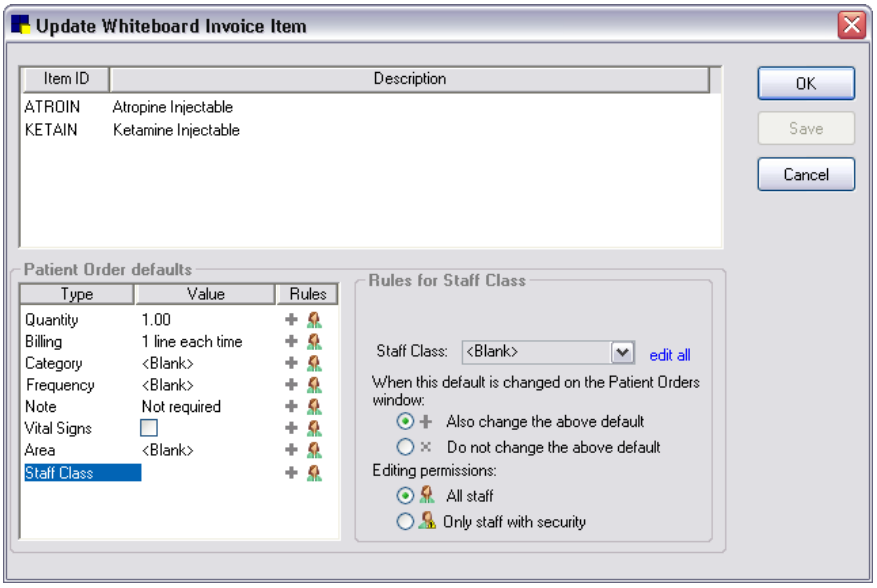


To set patient order defaults for multiple items simultaneously:

IMPORTANT: Make sure you have a current backup of your database before using the Invoice Item Setup tool.

1. On the Invoice Item Setup window (**Tools > Invoice Item Setup**), click the **Whiteboard** tab.
2. Use the fields in the *Invoice item and location* area to narrow the list of items to retrieve by specifying search criteria and specifying if you want to retrieve Inventory items, Service items, or both.
3. Click **Retrieve**.
4. If you want to view the currently assigned rules for an invoice item, select the single invoice item in the list. Its associated rules display in the *Patient Order Rules* area at the bottom of the tab. (Note: The fields in the *Patient Order Rules* area will be empty if rules have not been specified for the selected item or if multiple items are selected and those items have differing rules.)

5. In the list of retrieved invoice items, do any of the following to select the patient order items you want to update:
   - If you want to select more than one item, hold down the CTRL key while you select the items you want.
   - If you want to select a group of consecutive items, click the first item in the group and then hold down the SHIFT key while you click the last item in the group. The first and last items and all the items between them are selected.
   - If you want to select all items in the list, click **Select All**.
   - If you want to deselect all items in the list, click **Deselect All**.
6. With the desired invoice items selected in the list, click **Edit**. The Update Whiteboard Invoice Item dialog box appears.



Note: The settings available on the Update Whiteboard Invoice Item dialog box are similar to those on the Invoice Item Information window's **Whiteboard** tab. See "Overview of Fields on the Whiteboard Tab" on page 8 for information on these settings.

7. Select a Patient Order field in the list on the left to display its associated rules on the right.

   Note: In the Patient Order defaults list on the left, if the **Value** column is empty, this means that there are differing settings for the selected invoice items. (Note that if **<Blank>** shows in the **Value** column for the field, this means that the value is set up to appear blank by default on the Patient Orders window; a **<Blank>** field is not the same as an empty field.)
8. If the selected invoice items have differing settings for this field (indicated by an empty **Value** column), click **edit all** to confirm that you want to edit the field and set it to the same value for all selected invoice items at once.
9. Depending on the field type selected on the left, a drop-down list, text box or check box may display on the right. Specify the desired default value to use for this field in its associated column on the Patient Orders window. If you want to require staff to enter or select the value at the time the item is added to the Patient Orders, set the default value to **<Blank>**.

10. Set the **When this default is changed…** and **Editing permissions** settings for this field. See "Overview of Fields on the Whiteboard Tab" on page 8 for information on these settings.
11. Do one of the following:
    - If you want to save your updates and continue setting defaults for additional Patient Order fields for the selected items, click **Save** and repeat steps 7–11.
    - If you are finished setting Patient Order field defaults for the selected items, click **OK** to save any unsaved changes and return to the Invoice Item Setup tool's **Whiteboard** tab.

See the *Cornerstone Administrator's Manual* or the Cornerstone Help system for more information on using the Invoice Item Setup tool.

Electronic Whiteboard Windows Include Secondary Reason for Visit

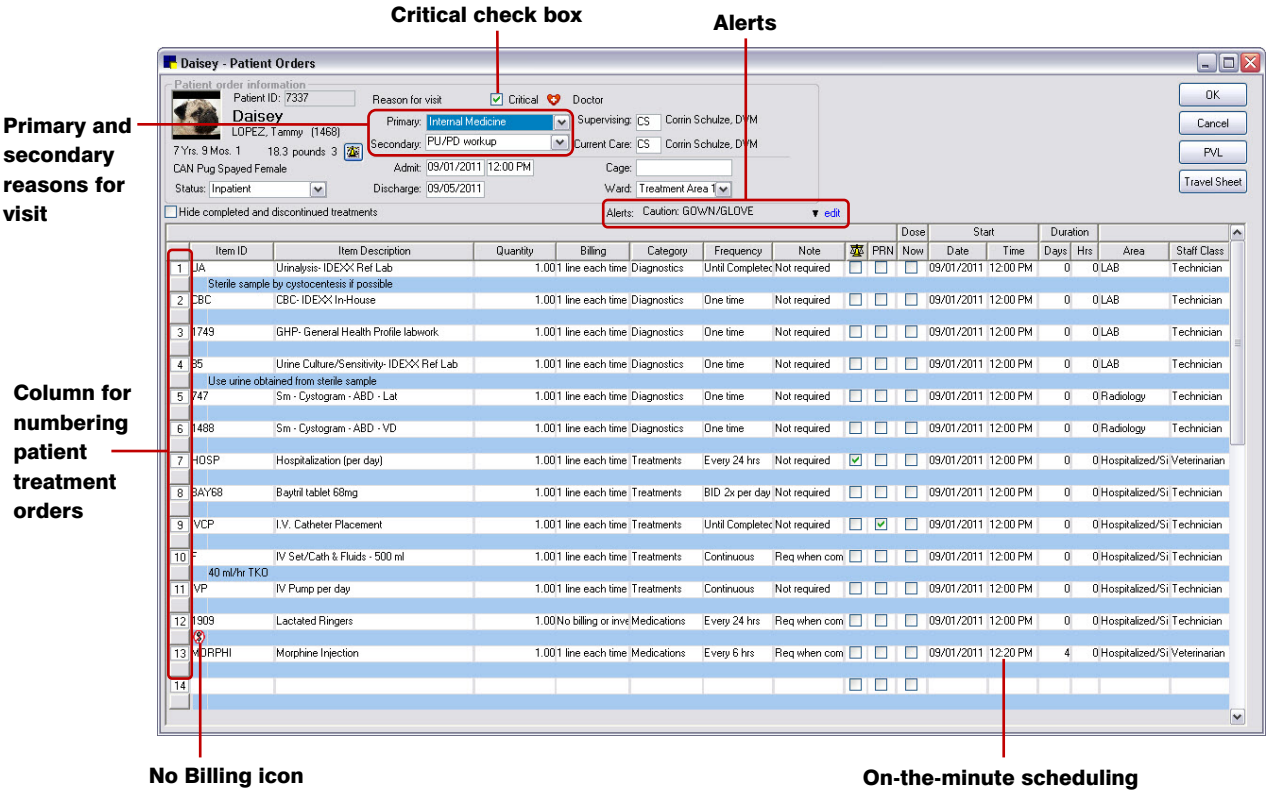
The Reason for Visit feature (**Controls > Reason for Visit**) has been expanded in Cornerstone 8.2 to allow for both primary and secondary reasons for visit, allowing you to provide more detail on the specific problem or procedure associated with the patient's visit. A secondary reason can now be specified on the Patient Orders window and displays on the Whiteboard and Patient Treatment windows.

See "Secondary Reasons for Visit" on page 65 for information on this new feature.

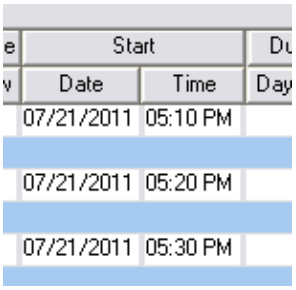
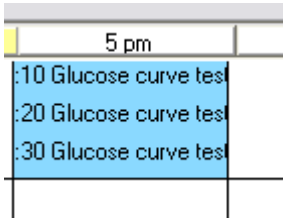
Use

Patient Orders Window

The Patient Orders window is used to add and manage treatment orders for a specific patient on the Whiteboard. In Cornerstone 8.2, Patient Orders enhancements allow for a "smarter" patient treatment ordering process that saves time and provides more detailed information about the patient.

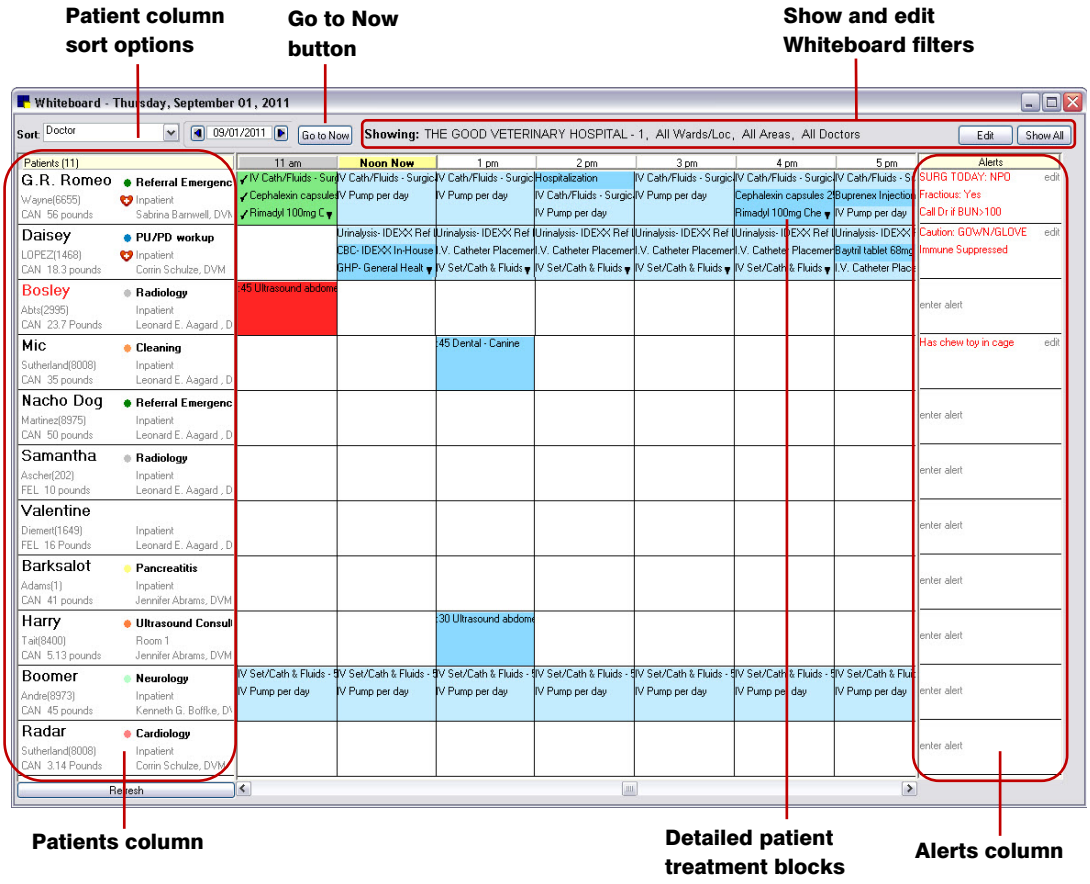


New Feature/Enhancement	Description
Critical check box	Select the **Critical** check box to flag a patient as critical and display the **Critical** icon for the patient on all Electronic Whiteboard windows, the Check-in/out window and the Census List window. Patients flagged as critical display at the top of the **Patients** column on the Whiteboard regardless of the selected sort order (with the exception of the Treatments for Hour sort orders, where critical patients display at the top only if they have treatments for that hour). **Note:** The **Critical** check box can also be selected for a patient from the Check-in/out window.
Primary and secondary reasons for visit	You can now specify both a primary and a secondary reason for visit, allowing you to provide more detail on the specific problem or procedure associated with the patient's visit. A **Primary** reason must first be specified in order to activate the **Secondary** field. The secondary reason can then be selected from the predefined drop-down list, or staff can manually enter a different secondary reason. See "Secondary Reasons for Visit at the Time of Use" on page 66 for more information. **Note:** The reason for visit fields can be set on the Patient Orders window, New/Edit Appointment window or the Patient Check-in/out window.
Alerts	If Whiteboard alerts exist for the patient, you can view and edit those alerts from the Patient Orders window. If there is more than one alert for the patient, a downward-pointing arrow displays to the right of the **Alerts** field to indicate there are more alerts to view. Rest the mouse pointer on the displayed alert to view the patient's full alert list in a pop-up window. To open the Whiteboard Alerts dialog box to edit or add to the patient's alert list, click the blue **edit** link (located to the right of the **Alerts** field).
Left column for numbering patient treatment orders	To specify the order in which treatments should display on the Whiteboard and Patient Treatments windows, renumber them as needed by changing the numbers in the left column. The order of treatments specified on the Patient Orders window is the order that will be used to display the treatment lines within the patient's treatment block for each hour on the Whiteboard. To renumber a treatment order line, change the number in the left column as desired and then press TAB. **Note:** For group items, you cannot change the order of the individual items until after the patient orders have been saved by clicking **OK** on the Patient Orders window. You can then reopen the window and reorder the individual items as desired.

New Feature/Enhancement	Description
No Billing icon	If an item's **Billing** field is set to **No billing or inventory reduction**, the **No Billing** icon displays in the blue line below the line item as a reminder to staff. This icon also appears on the Patient Treatments window for the order item. When a Patient Orders item is set to **No billing…**, the invoice item is not pulled from inventory and the client is not charged.
Schedule treatments using incremental (on-the-minute) time scheduling	In previous versions, the **Start Time** for a treatment was limited to on-the-hour times (e.g., 10 AM, 2 PM). In Cornerstone 8.2, you can specify a **Start Time** using incremental (on-the-minute) times (e.g., 10:15 AM, 2:30 PM). The incremental treatment times will show on the Patient Treatments window and the Whiteboard. **Note:** If you want to enter orders for a treatment needing to be completed every X minutes within a single hour—for example, a Glucose Curve test every 10 minutes—you would need to add a separate treatment order line for each occurrence. So for the Glucose Curve example, the orders would look like this on the Patient Orders window:  …and like this on the Whiteboard grid's treatment block:  If an incremental time is specified, the treatment line turns red as overdue on the Whiteboard when that specific time passes (not at the end of the hour, as with non-incremental treatment times).

Whiteboard (Main Grid) Window

The Whiteboard window provides a centralized view of patients' treatment schedules and statuses. Also known as the "main grid," this window acts as a key entry point to ordering and editing treatments. In Cornerstone 8.2, the Whiteboard allows quick access to important patient information at a glance, while also offering more detailed information on scheduled treatments and flexible date/time viewing options.



Patient Column Sort Options

The new **Sort** drop-down list allows you to sort the Whiteboard **Patients** column by:

- Patient Name
- Client Name
- Reason for Visit
- Check in Date/Time
- Doctor
- Status
- Treatments for Hour

Notes:

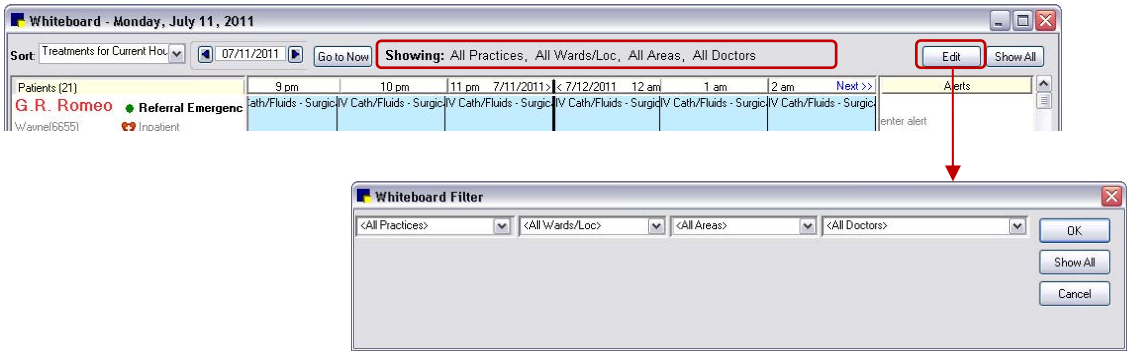
- Patients flagged as critical display at the top of the **Patients** column on the Whiteboard regardless of the selected sort order (with the exception of the Treatments for Hour sort orders, where critical patients display at the top only if they have treatments for that hour).
- The sort order defaults to Patient Name unless a different default sort option has been specified in Workstation defaults. See ““Whiteboard Sort” Option in Workstation Defaults” on page 4 for more information.

‘Go to Now’ Button Quickly Resets Grid to Current Hour

Click the **Go to Now** button to reset the grid to the current hour and day. The current hour column header displays in bold black text on a yellow background with “Now” appearing to the right of the hour.

Show and Edit Whiteboard Filters

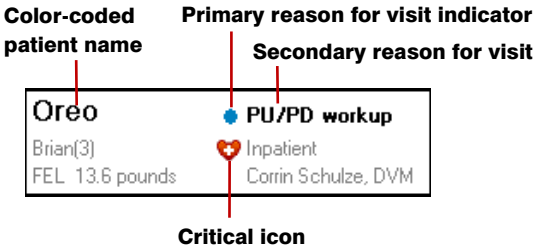
In earlier Cornerstone versions, filters were selected from drop-down lists available at the top of the Whiteboard window. In Cornerstone 8.2, a “Showing:” area at the top of the window displays all currently selected filters, with an **Edit** button that allows you to access the new Whiteboard Filter dialog box.



Use the drop-down lists on the Whiteboard Filter dialog box to narrow the list of patients on the Whiteboard by **Practice** (Multi-Location/Single Database configurations only), **Ward/Location**, **Area** and/or **Doctor**. You can also click **Show All** on the Whiteboard Filter dialog box (or on the Whiteboard) to quickly reset the filter criteria to display all patient treatments within the given timeframe.

Patients Column

The **Patients** column to the left of the grid displays any patient marked as an Inpatient upon check in. In Cornerstone 8.2, the patient information blocks in the **Patients** column have been redesigned to provide a better at-a-glance view of important patient information.

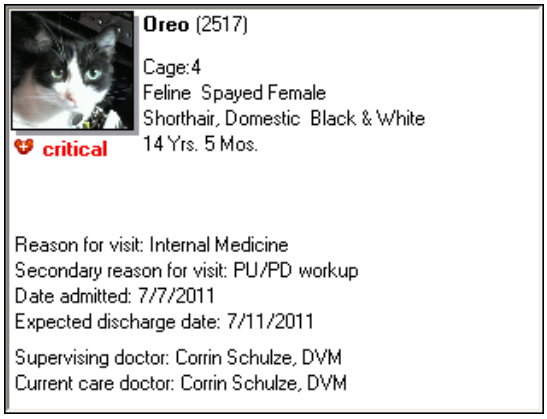


New Feature/Enhancement	Description
Color-coded patient name	Color-coding of the patient name helps to identify the status of the patient or the status of the patient's treatment orders. • **Yellow** – Indicates the patient does not have any treatment orders assigned OR is on the Whiteboard past the expected discharge date. • **Red** – Indicates the patient has overdue treatment orders. • **Black** – Indicates the patient's treatments are up to date.
Primary and secondary reasons for visit	The color-coded dot indicates the primary reason for visit and the adjacent bold text provides the secondary reason. If a secondary reason is not assigned, the primary reason text displays. **Note:** The primary reason for visit color is set in **Controls > Appointment Scheduler > Reasons for Visit**.
Critical icon	If the patient has been flagged as critical on the Patient Orders window or during check-in, the **Critical** icon displays next to the patient status.

Note: The number shown in parentheses at the top of the **Patients** column indicates the current number of patients on the Whiteboard (note that any currently selected filters may affect the number shown). Depending on the size and orientation of your monitor, there may be more patients on the Whiteboard than can be displayed vertically in this column at one time. This indication of the total number of patients serves as a reminder that you may need to use the right-side scroll bar to view additional patients at the bottom of the list.

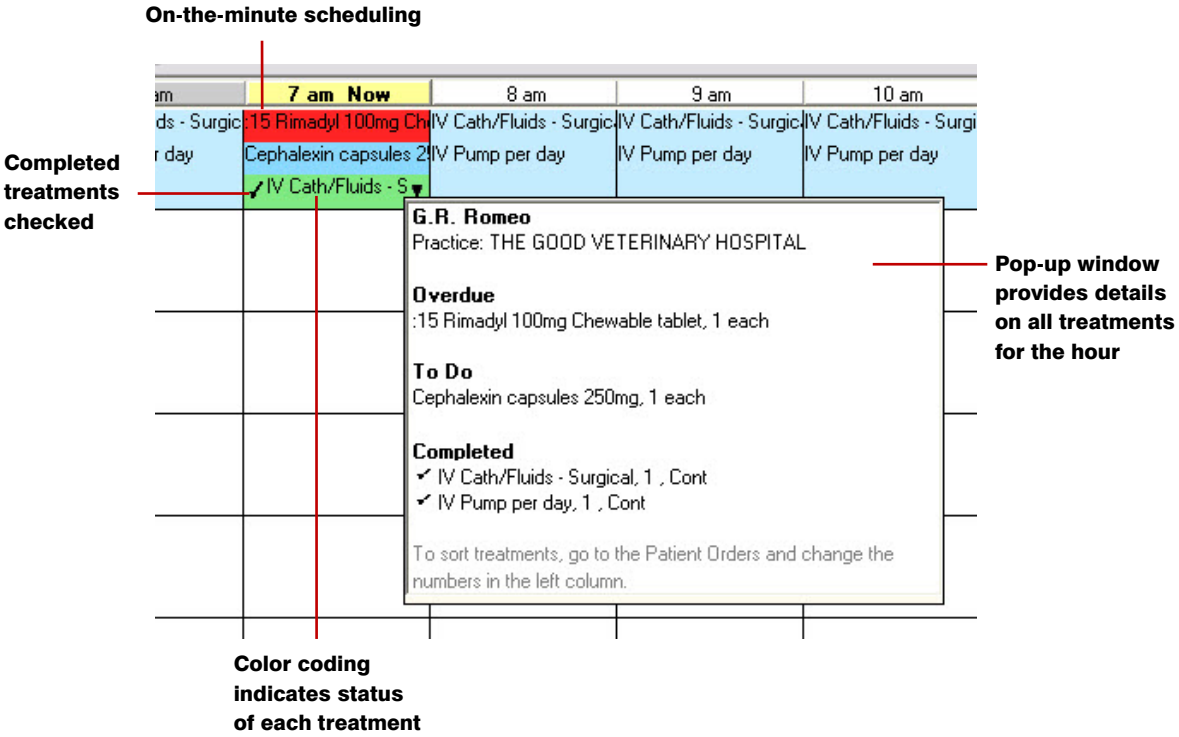
View Additional Patient Information in a Pop-up Window

To view additional patient information in a pop-up window, rest the mouse pointer on a patient block. The enhanced pop-up window displays patient order information pertaining to this visit and includes the pet's picture (if one is included in the patient record).



Detailed Patient Treatment Blocks

Patient treatment blocks have been enhanced to include detailed information on each treatment scheduled for the time block, as well as a new pop-up window that provides an even greater level of detail.


On-the-minute scheduling
7 am Now
8 am
9 am
10 am
:15 Rimadyl 100mg Ch
IV Cath/Fluids - Surgic
Cephalexin capsules 2
IV Pump per day
IV Cath/Fluids - S
Completed treatments checked
G.R. Romeo
Practice: THE GOOD VETERINARY HOSPITAL
Overdue
:15 Rimadyl 100mg Chewable tablet, 1 each
To Do
Cephalexin capsules 250mg, 1 each
Completed
IV Cath/Fluids - Surgical, 1 , Cont
IV Pump per day, 1 , Cont
To sort treatments, go to the Patient Orders and change the numbers in the left column.
Pop-up window provides details on all treatments for the hour
Color coding indicates status of each treatment

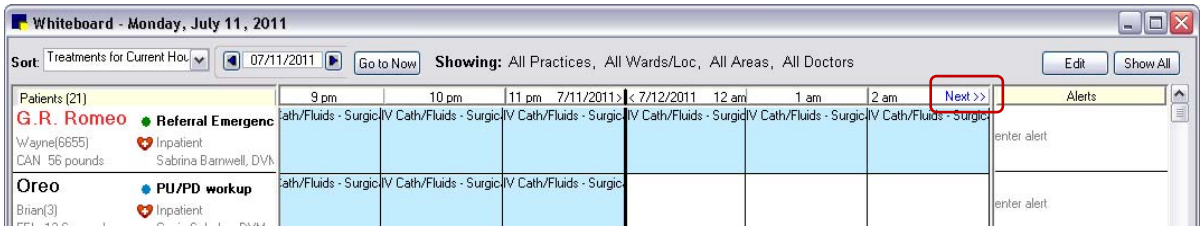
New Feature/Enhancement	Description
Pop-up window provides details on all treatments for the hour	If more than three treatments are scheduled for a patient during the hour, a downward-pointing arrow displays in the block to indicate there are more treatments to view. Rest the mouse pointer on the treatment block to view a pop-up window providing the list of treatments scheduled to be performed for the patient in this time slot. The pop-up window lists treatments broken out into groupings of **Overdue** (always displayed at the top), **To Do**, **Completed**, and **Did Not Perform**.
Treatment lines indicate incremental (on-the-minute) time scheduling	If a treatment's Start Time was set up to use an incremental time (e.g., 10:15 AM, 2:30 PM) on the Patient Orders window, the incremental time will show for that treatment line on the Whiteboard window.
Check mark displays next to completed treatments	In both the treatment block and the pop-up window, a check mark displays next to any completed treatments.
Color coding indicates status of each treatment line within a block	Color coding indicates the status of each treatment line: **Green** = Completed **Bright blue** = Scheduled **Light blue** = Continuous **Red** = Overdue **Gray** = Discontinued or Did not perform
Order of treatment lines within a block based on numbering of left column on Patient Orders window	The treatment lines listed within a block are ordered according to the numbering of the invoice items in the left-most column on the Patient Orders window.

Expanded Hours for Whiteboard Column Display

Depending on the option set in Whiteboard defaults, the Whiteboard grid's hour columns may display for the current day only OR for the current day with 3 hours added for the previous and next days.

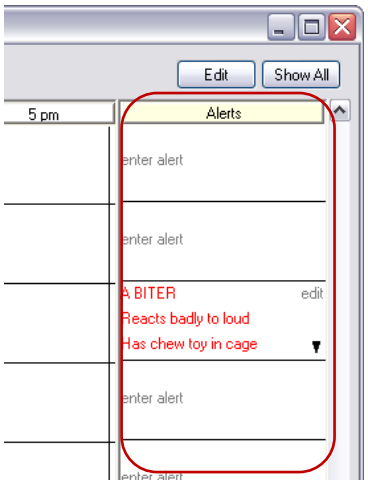
If the **current day with 3 hours…** default is selected for the workstation, **<< Previous** and **Next >>** links display when you scroll horizontally to the outer limits of the 24 one-hour columns. You can click the appropriate link to move the grid columns to change the date and display the hours for the previous day or next day.

See ""Hours to Show" Option in Whiteboard Defaults" on page 3 for information on selecting an **Hours to show** display option in Whiteboard defaults.



Alerts Column

In Cornerstone 8.2, the new **Alerts** column on the Whiteboard window allows you to add, edit and view selected types of patient alerts.



Depending on your setup, the **Alerts** column may display the following types of alerts (which are automatically added when a patient is initially placed on the Whiteboard):

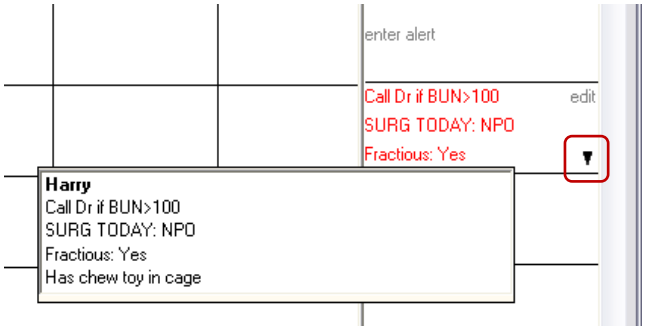
- Whiteboard Alert List alerts
- Patient Prompt alerts
- Patient Classification alerts
- Alerts manually entered in the **Alert notes** field on the Check-in/out window
- Alerts manually entered on the Whiteboard

Note: After a patient is added to the Whiteboard, changes to patient prompt, patient classification, or check-in alert information will not be reflected and will need to be manually updated on the Whiteboard.

See “Setting Up and Selecting Alerts to Display on the Whiteboard” on page 4 for information on setting up alerts to display on the Whiteboard.

Viewing Alerts on the Whiteboard

If more than three alerts exist for a patient, a downward-pointing arrow ▼ displays in the block to indicate there are more alerts to view. Rest the mouse pointer on the alert block to view the patient’s full alert list in a pop-up window.

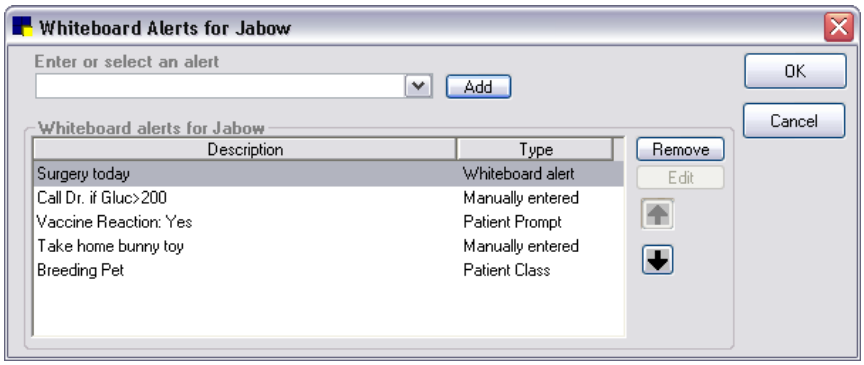


Alert text displays in red unless it is a Patient Prompt Alert that has been assigned a different color in **Controls > User Defined Prompts**.

Adding and Editing Alerts on the Whiteboard

You can manually enter alerts to display in a patient's **Alerts** column on the Whiteboard window. You can also change the order of the alerts as they are listed in the Alerts block, remove an alert so it does not display in the block, and edit a manually entered alert.

Click anywhere within a patient's Alerts block to open the Whiteboard Alerts dialog box to edit or add to the patient's Alerts list.



To add a Whiteboard alert:

If needed, you can manually enter patient alerts to display in a patient's **Alerts** column on the Whiteboard.

1. On the Whiteboard Alerts dialog box, type the alert in the text box and click **Add**.
2. Click **OK**.

To edit a manually entered Whiteboard alert:

1. On the Whiteboard Alerts dialog box, select a manually entered alert in the patient's Whiteboard alerts list and click **Edit**.
2. Make changes to the text to display for the alert and click **OK**.
3. Click **OK**.

To reorder Whiteboard alerts:

The Whiteboard has room to display only three alerts in each patient's Alerts block, and the Patient Orders and Patient Treatments windows are limited to displaying only one alert. For this reason, you may want to change the order so that the most important alerts are at the top of the list and always visible.

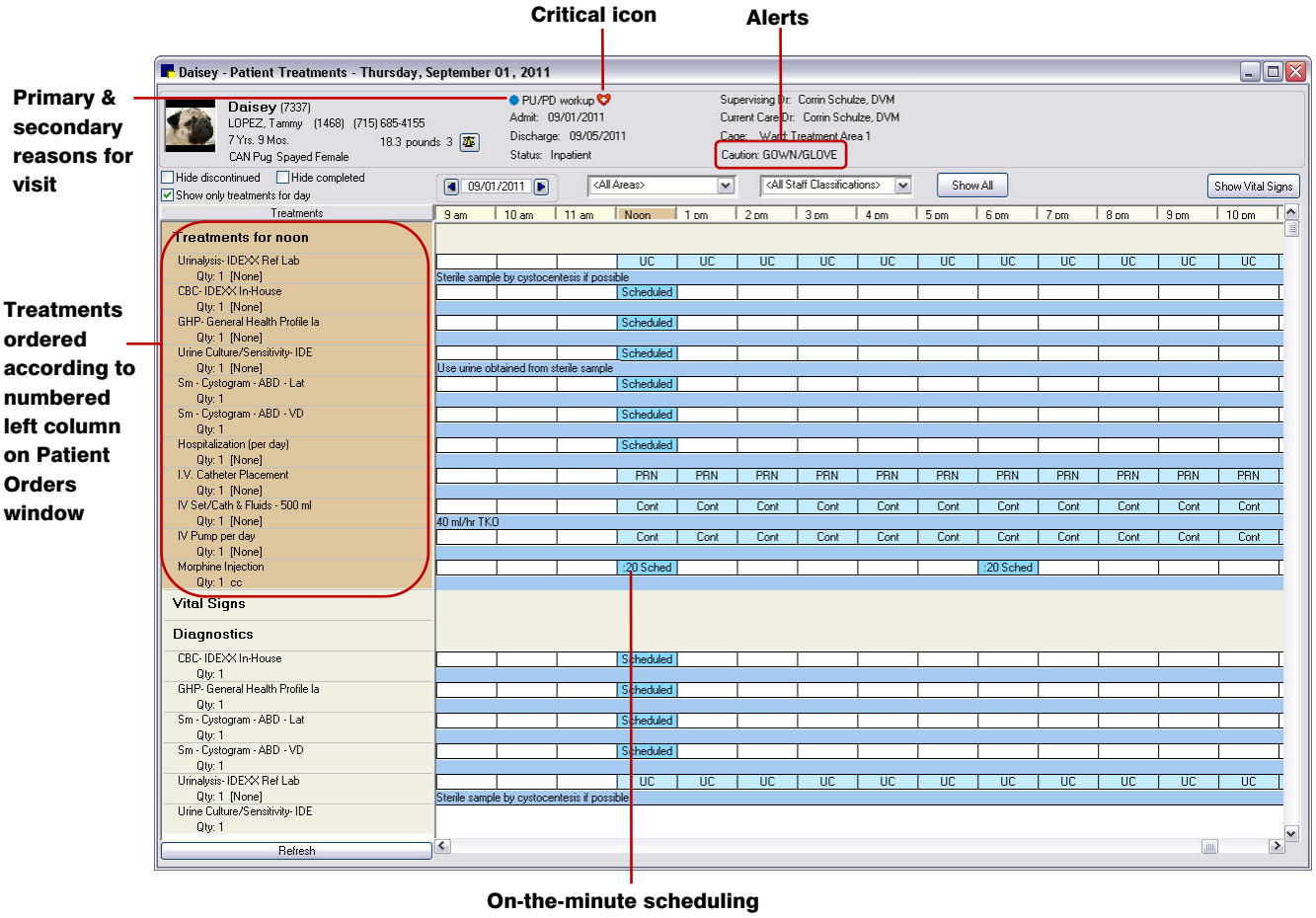
1. On the Whiteboard Alerts dialog box, select an alert in the patient's Whiteboard alerts list and then click the ⬆ or ⬇ arrow button as needed to move it within the list.
2. Click **OK**.

To remove a Whiteboard alert:

1. On the Whiteboard Alerts dialog box, select an alert in the patient's Whiteboard alerts list and then click **Remove**.
2. Click **OK**.

Patient Treatments Window

The Patient Treatments window displays treatment orders for a specific patient and allows you to mark each scheduled treatment as **Completed** or **Did not perform**. In Cornerstone 8.2, enhancements to this window allow you to view more detailed information about a patient and the scheduling of the patient's treatments.



New Feature/Enhancement	Description
Primary and secondary reasons for visit	Both the primary and secondary reasons for visit are now indicated, providing staff with more detail on the specific problem or procedure associated with the patient's visit. The colored-coded dot indicates the primary reason for visit and the adjacent text provides the secondary reason. If a secondary reason is not assigned, the primary reason text displays.
Critical icon	If the patient has been flagged as critical on the Patient Orders window or during check-in, the **Critical** icon displays within the patient information area near the top of the window.

New Feature/Enhancement	Description
Alerts	If Whiteboard alerts exist for the patient, you can view those alerts from the Patient Treatments window. If there is more than one alert for the patient, a downward-pointing arrow ▼ displays to the right of the **Alerts** area to indicate there are more alerts to view. Rest the mouse pointer on the displayed alert to view the patient's full alert list in a pop-up window.
No Billing icon	If an order item's **Billing** field was set to **No billing or inventory reduction** on the Patient Orders window, this icon displays as a reminder in the **Treatments** column.
Treatments ordered according to numbered left column on Patient Orders window	The list of treatments displayed within the *Treatments for* [*selected hour*] area is ordered according to the invoice item numbering in the left-most column on the Patient Orders window.
Treatment blocks indicate incremental (on-the-minute) time scheduling	If a treatment's Start Time was set up to use an incremental (on-the-minute) time (e.g., 10:15 AM, 2:30 PM) on the Patient Orders window, the incremental time will show on each applicable hour block on the Patient Treatments window. For example, if a treatment is scheduled for 10:30 AM, the treatment's 10 AM block on the Patient Treatments window will display **:30 Sched**.

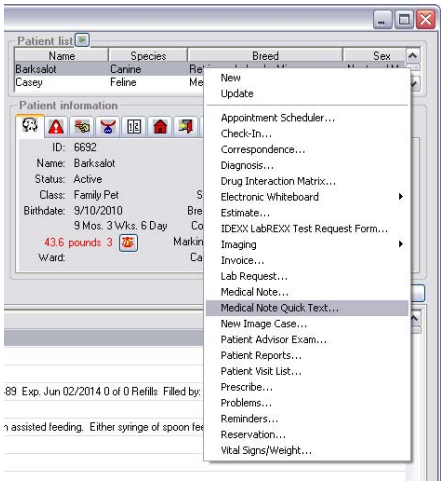
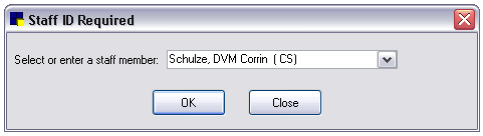
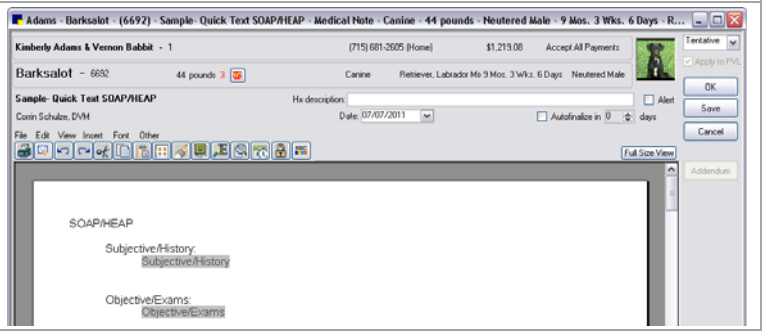
Tip: As in previous versions, you can right-click in the **Treatments** column or within the treatments grid to display a list of menu options.

Text-Only Medical Notes

Overview

IDEXX Cornerstone* 8.2 software introduces the new text-only medical note option that allows you to create and designate a single Quick Text medical note template for quickly entering a medical note. In addition, the full contents of all text-only medical notes can be viewed inline on the Patient Clipboard **Text** tab or **Medical Notes** tab without needing to open the note or use the Preview pane.

The Medical Note Quick Text feature offers a simpler, faster option for adding information to a patient's medical record. Similar to the "None" Classic medical note template available in Cornerstone 7.6 and earlier versions, the Medical Note Quick Text feature allows you to simply right-click on the Patient Clipboard* and select **Medical Note Quick Text**, enter your staff ID, and immediately start typing your notes in the Cornerstone Editor.

1	With the patient's record open on the Patient Clipboard, right-click the patient's name and select **Medical Note Quick Text**.	
2	Enter your staff ID.	
3	Immediately start typing your notes in the template you've designated as your Quick Text template.	

You can get started immediately with no setup required by using the default Medical Note Quick Text template (the "Sample- Quick Text Blank" template). If you don't want to use the blank default template, you can create your own text-only template (in **Lists > Documents > Templates**) and then assign your template as the "Medical Note Quick Text document" in Documents defaults. See the setup steps starting on page 25 for more information.

Note: Although this section focuses on creating text-only *medical notes* for patients, note that the text-only option is also available for *correspondence* templates and documents.

Text-Only vs. Enhanced Medical Notes – Feature Comparison Table

The following table summarizes the main features and functionality available with the two main styles of medical notes offered in Cornerstone 8.2.

Feature/Functionality	Text-Only Medical Notes	Enhanced Medical Notes
Use a designated Medical Note Quick Text document for immediate text entry, bypassing the Start New Document window steps	•	
Apply a single color to all text using the Color All Text option	•	
Apply multiple colors to select words or paragraphs throughout a document		•
Apply text styles and formatting, such as font selection, bold, italics, outlining, numbered/bulleted lists, etc.		•
Insert check boxes, tables and other design elements		•
Import graphic files, photos and logos		•
Add standard text-based bookmarks	•	•
Add image-based bookmarks (bookmarks that include signatures, images, etc. or are inserted in a table format)		•
Insert a date/time stamp	•	•
Insert a problem description or diagnosis description	•	•
Insert a table of problem details, diagnosis details or vital signs		•
Lock a medical note to create a quick “tab through” form using Text Input fields	•	•
Use Spell Check	•	•
Use header/footer features		•
Include attachments	•	•
Include invoice items	•	•
Use options for page setup and margins		•
Email the client directly from the medical note	•	•
Save a document with a Draft, Tentative or Final status and return repeatedly to add to or update the document	•	•
Void a document	•	•
Add an addendum to a document	•	•
Insert an entire medical note into a correspondence document	•	•
View full contents of the medical note inline on the Patient Clipboard Text tab and Medical Notes tab	•	
View medical note in the Preview pane on the Patient Clipboard	•	•

Cornerstone Editor Features and Limitations in Text-Only Mode

When setting up a text-only template or adding a text-only medical note, the Cornerstone Editor displays in "text-only mode," which has the following differences from the standard editor:

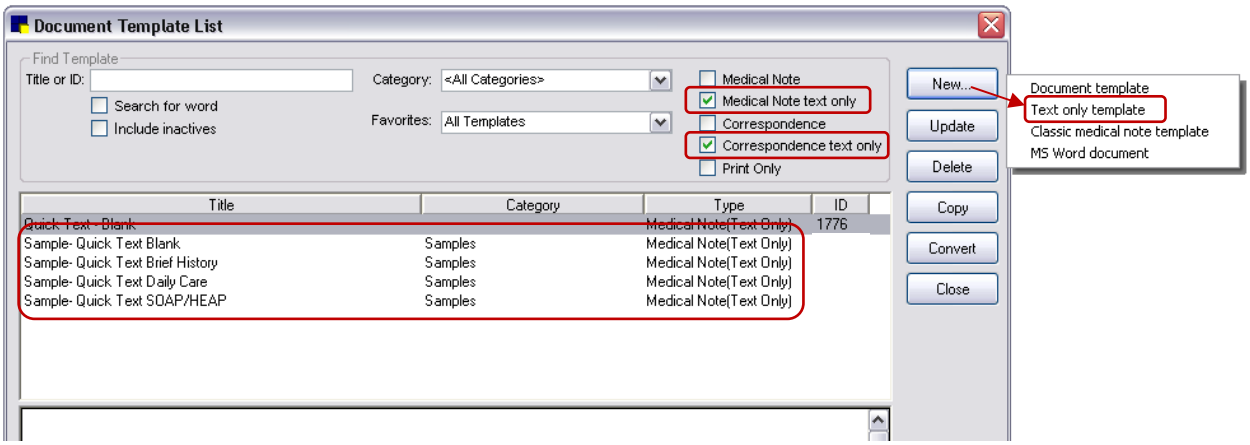
- A **Color All Text** button is available. This text-only option allows you to apply a single color to all text in the template or document. (Note: If the **Color All Text** option is used, the history description and document text will display in the selected color in patient history.)
- The menus, toolbar buttons and right-click menus available are limited to those options that pertain to text-based data entry.
- Only text-based bookmarks can be used (image- or table-based bookmarks are not available for selection).
- In the event that a text-only document is saved for the first time with its **Hx description** field left blank, if there is text in the first line of the document, that text will be used as the history description.

Note: If you copy and paste content into a text-only template or document, only plain text is pasted. Any font properties, formatting, tables, graphics, check boxes, etc. copied from an enhanced document will not be included when pasted in a text-only document.

Setup

Setting Up a Text-Only Template

The Document Template List window (**Lists > Documents > Templates**) has been updated to add options for finding, creating and converting text-only templates.



Tip: Four sample Quick Text templates are included in the Samples category.

To find a text-only template:

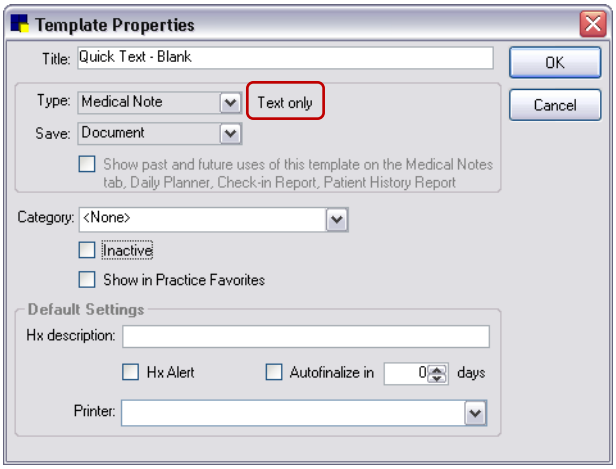
➢ On the Document Template List window, in the *Find template* area at the top of the window, narrow the list of templates to text-only templates by selecting the **Medical Note text only** and **Correspondence text only** check boxes (clear all other template type check boxes).

The template list will display only text-only templates.

Note: If the **Print Only** check box is selected, both standard Print Only templates and Print Only (Text Only) templates will display in the list, distinguishable by looking at the designation in the **Type** column.

To create a new text-only template:

1. On the Document Template List window, click the **New** button and then select **Text only template**.
2. Create the document template in the Cornerstone Editor (in text-only mode). See "Cornerstone Editor Features and Limitations in Text-Only Mode" on page 25 for information.
3. Click **Edit Properties** to set properties including the title, category and history description. Note that the "Text only" designation is indicated on the Template Properties dialog box.



4. Save the template.

To create a text-only template by copying a sample Quick Text template:

Using the Document Template List **Copy** button, you can create a copy of a sample Quick Text template provided in Cornerstone and assign a new name to the copied (new) template. The new template will contain all elements from the original (copied) text-only template and any bookmarks will retain their functionality.

Note: You cannot use copy/paste to copy bookmarks from one template to another.

Sample templates for Quick Text medical notes are available in the Samples category. You can easily create a copy of one of these templates and modify it to meet the needs of your practice.

1. On the Document Template List window, in the *Find template* area at the top of the window, narrow the list of templates by selecting the **Samples** category and selecting only the **Medical Note text only** check box (clear all other template type check boxes).
2. In the template list, select a **Sample- Quick Text…** template to copy and then click **Copy**.
3. Enter a new description (name) for the template and click **OK**.
4. To place the newly copied template into a different category, update the template and in the Cornerstone Editor, click **Edit Properties**. Select a different category from the **Category** drop-down list and click **OK**.
5. Save the template.

To use text-only template conversion options:

➢ On the Document Template List window, select a template in the list and then click **Convert**. The conversion options available depend on the type of template you selected to convert.

Text-only template conversion options include:

- **Enhanced converted to Text Only –** Converts the template and opens it for editing in the Cornerstone Editor (in text-only mode). The template retains only text from the enhanced template; tables, images, check boxes, etc. will be removed.
- **Text Only converted to Enhanced –** Converts the template and opens it for editing in the Cornerstone Editor.
- **Classic converted to Text Only –** Converts the template and opens it for editing in the Cornerstone Editor (in text-only mode).

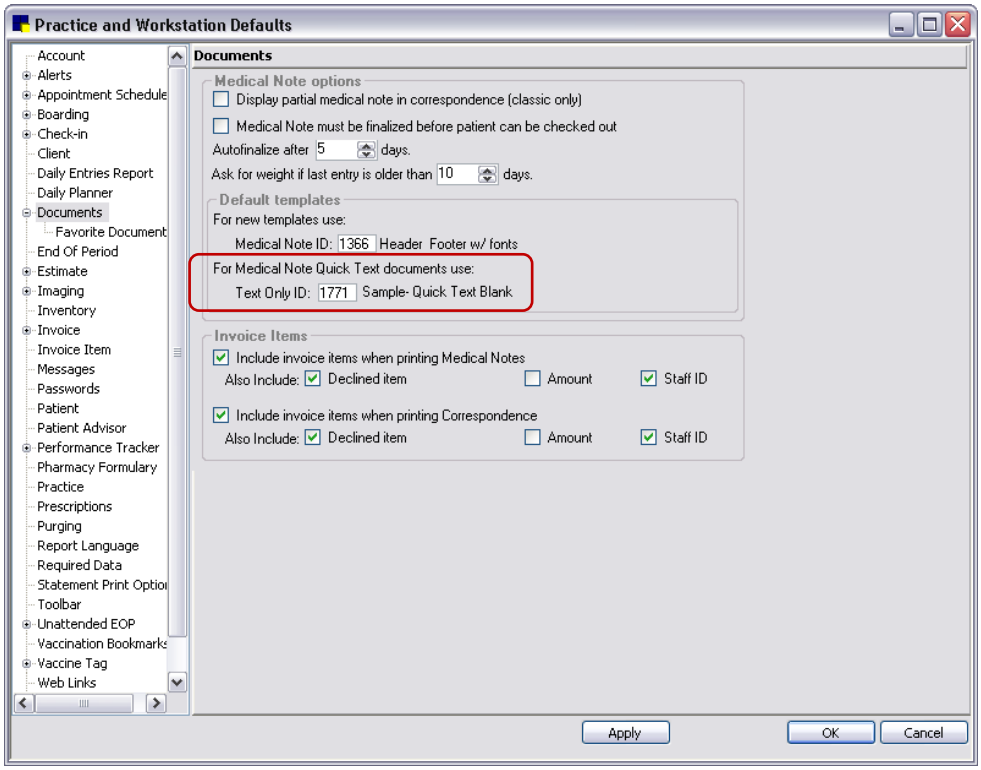
Conversion notes:

- When you convert a template, the original template is saved but inactivated.
- Bookmarks and invoice items are retained in the conversion, but note that when converting to a text-only template, any non-text bookmarks will be removed.

See the *Cornerstone Administrator's Manual* or the Cornerstone Help system for more information on converting templates.

Designating the Text-Only Template to Use for Adding Quick Text Medical Notes

Documents defaults have been reorganized slightly into new groupings and an option has been added for designating a default Medical Note Quick Text document.



In the *Default templates* area, a new **For Medical Note Quick Text documents use** setting allows you to specify the text-only template that will be used when you add a Quick Text medical note for a patient.

To designate this default template, in the **Text Only ID** field, enter the ID of the template by either typing the ID or pressing F2 to search for and select the template from the Document Template List.

Note: In Cornerstone 8.2, the default setup document template field (used for creating or converting to a new enhanced document template) has been moved to the *Default templates* area and the field has been renamed **For new templates use: Medical Note ID**.

Use

Adding a Quick Text Medical Note

To add a Quick Text medical note for a patient:

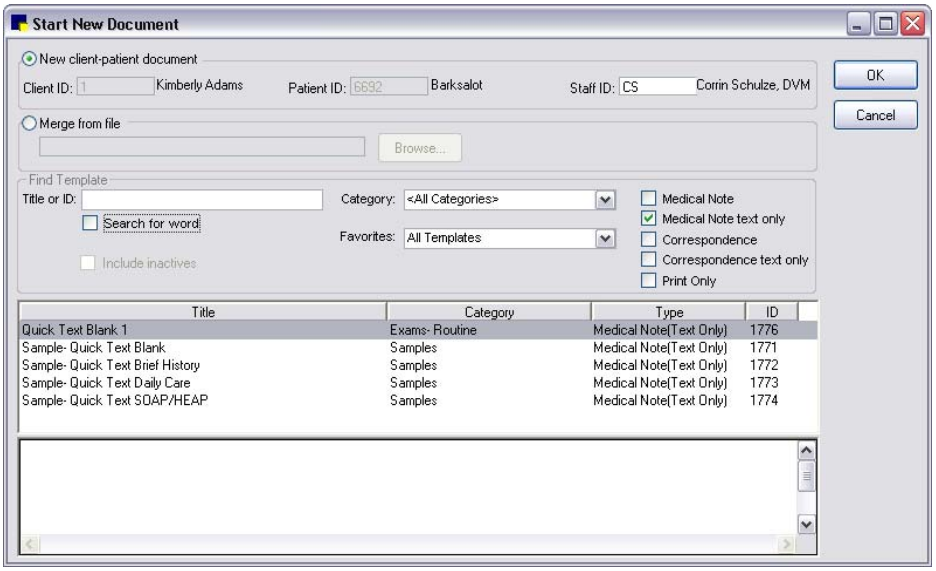
1. With the patient's record open on the Patient Clipboard, right-click the patient's name and select **Medical Note Quick Text**.
2. Enter your staff ID by typing the ID, selecting the staff from drop-down list, or pressing F2 to select from the Staff List.
3. Follow steps 6–16 in the section that follows to create a text-only medical note in the Cornerstone Editor.

Adding a Text-Only Medical Note (Other than the Designated Medical Note Quick Text Document)

Note: This section applies when wanting to add a text-only medical note other than the one designated as the default Medical Note Quick Text document. For a Quick Text document, simply right-click on the patient on the Patient Clipboard and select **Medical Note Quick Text**.

To create a text-only medical note (or text-only correspondence document) for a patient:

1. On the Patient Clipboard, right-click on a patient name in the *Patient list* area and select **Medical Note** (or **Correspondence**).
2. On the Start New Document window, complete the Client ID, Patient ID and Staff ID fields as necessary (press F2 or double-click to select an ID from a list), and press TAB to proceed to the next field.
3. In the *Find template* area at the top of the window, narrow the list of templates to text-only templates by selecting the **Medical Note text only** check box (and/or the **Correspondence text only** check box). Clear all other template type check boxes.



4. Click on a text-only template in the list to see a preview of the document in the preview area at the bottom of the window.
5. Once you have located the desired template, select it and click **OK** (or double-click the template).

   The template opens in the Cornerstone Editor (in text-only mode).
6. Depending on the setup for the selected template, you may be prompted to complete one or more of the following tasks upon opening:
   - If the patient weight is not considered current (based on the **Ask for weight…** setting in Documents defaults), the last entered weight appears in red. If you are adding a medical note, a weight entry dialog box appears automatically, allowing you to update the weight for this patient.
   - If there are any Question/Answer bookmarks included in the template, the associated pop-up boxes display.
   - If there are any Pick items included in the template with a status other than Blank, you are prompted to pick the applicable items.
   - If there are any Group items included in the template with a status other than Blank, the group will be applied and any associated pop-up boxes display.
7. Check that the information displayed in the Client Banner and Patient Banner looks correct. If changes are necessary, double-click within the appropriate banner to update the information.
8. In the **Hx description** field, if desired, enter or modify the description of this document to appear in the patient's history.

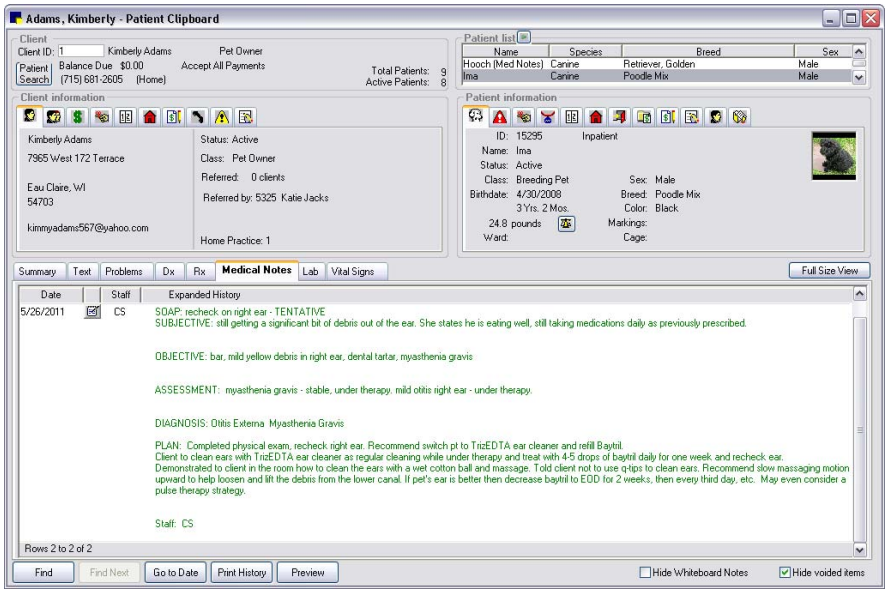
   Note: If the **Hx description** is blank when the document is saved for the first time, if there is text in the first line of the document, that text will be used as the history description.
9. If you want this document to stand out in history (line displays in history as white text on a bright red background), select the **Alert** check box.
10. If you want this document to be automatically finalized, click the **Autofinalize in** check box and enter the number of days after which this template will be marked as final. (Note: A document saved with Draft status will never autofinalize.)
11. If it is a tab-through form document that contains Text Input fields, make sure the Lock feature is enabled (use the **Lock/Unlock document** button on the toolbar) and tab through the entry fields.
12. Type the desired text to show in the patient's history for this text-only medical note (or correspondence document).
13. If desired, click the **Color All Text** button and select a color to apply to all text in the document.
14. When you have finished creating the document, click the drop-down list in the upper-right corner of the window and select a status setting for the document (Draft, Tentative or Final).
15. If you want to print the document, click the **Print** button or select **File > Print**.

    Note: When printing a text-only document, the **Print header** and **Print footer** options are not available on the Print Options dialog box.
16. Do one of the following:
    - Click **OK** to save a Draft, Tentative or Final document and close the Cornerstone Editor.

- Click **Save** to save the document and continue working on a Draft or Tentative document in the Cornerstone Editor (Final documents will save and close).
- Click **Cancel** to cancel document changes and close a Draft, Tentative or Final document.

Viewing the Full Contents of Text-Only Medical Notes Inline in History

Text-only medical notes allow full inline viewing of text-only document contents on the Patient Clipboard and Patient File windows. This means that you can quickly view any text-only medical note directly on the **Text** tab or **Medical Notes** tab without having to open the document in a separate preview or editor window.


Adams, Kimberly - Patient Clipboard
Client
Client ID: 1
Kimberly Adams
Pet Owner
Patient Search
Balance Due $0.00
Accept All Payments
(715) 681-2605 (Home)
Total Patients: 9
Active Patients: 8
Patient list
Name
Species
Breed
Sex
Hooch (Med Notes)
Canine
Retriever, Golden
Male
Ima
Canine
Poodle Mix
Male
Client information
Kimberly Adams
7965 West 172 Terrace
Eau Claire, WI
54703
kimmyadams567@yahoo.com
Status: Active
Class: Pet Owner
Referred: 0 clients
Referred by: 5325 Katie Jacks
Home Practice: 1
Patient information
ID: 15295
Inpatient
Name: Ima
Status: Active
Class: Breeding Pet
Sex: Male
Birthdate: 4/30/2008
Breed: Poodle Mix
3 Yrs. 2 Mos.
Color: Black
24.8 pounds
Markings:
Ward:
Cage:
Summary
Text
Problems
Dx
Rx
Medical Notes
Lab
Vital Signs
Full Size View
Date
Staff
Expanded History
5/26/2011
CS
SOAP: recheck on right ear - TENTATIVE
SUBJECTIVE: still getting a significant bit of debris out of the ear. She states he is eating well, still taking medications daily as previously prescribed.
OBJECTIVE: bar, mild yellow debris in right ear, dental tartar, myasthenia gravis
ASSESSMENT: myasthenia gravis - stable, under therapy. mild otitis right ear - under therapy.
DIAGNOSIS: Otitis Externa Myasthenia Gravis
PLAN: Completed physical exam, recheck right ear. Recommend switch pt to TrizEDTA ear cleaner and refill Baytril.
Client to clean ears with TrizEDTA ear cleaner as regular cleaning while under therapy and treat with 4-5 drops of baytril daily for one week and recheck ear.
Demonstrated to client in the room how to clean the ears with a wet cotton ball and massage. Told client not to use q-tips to clean ears. Recommend slow massaging motion upward to help loosen and lift the debris from the lower canal. If pet's ear is better then decrease baytril to EOD for 2 weeks, then every third day, etc. May even consider a pulse therapy strategy.
Staff: CS
Rows 2 to 2 of 2
Find
Find Next
Go to Date
Print History
Preview
Hide Whiteboard Notes
Hide voided items

Note: The Patient Clipboard graphic above shows an example of how the **Color All Text** option can be used to apply a single color to all text in a text-only document in the editor and in patient history.

Text-only medical note viewing options on the Patient Clipboard history tabs include:

- **Text tab –** View the complete contents of the text-only medical note inline in history.
- **Medical Notes tab –** View the complete contents of the text-only medical note inline in history.
- **Summary tab –** View the text-only medical note's **Hx description** inline in history or view the complete contents of the note in a pop-up window by resting the mouse cursor over the note's history line.

Cornerstone Imaging

Quickly Archiving Images for Deceased or Inactive Patients

An option has been added to the Archive Images window so that you can filter your search results to show only those patients who are inactive or deceased.

To filter for deceased or inactive patients when archiving:

1. On the menu bar, select **Activities> Imaging> Archiving**. The Archive Images window appears.
2. Select the **Show only inactive/deceased** check box, then:
   - To search for all inactive and deceased patients, click **Search**.
   - To search for particular inactive or deceased patients, fill in additional search criteria and then click **Search**.

See the *Cornerstone User's Manual* or the Cornerstone Help system for more information about the imaging archive feature.

Using Case to Send or Export Images

The case feature is new to Cornerstone Imaging. Most of the time, you'll want to use the feature as described in the next chapter, "IDEXX SmartLink Technology for Telemedicine." However, you can also create a case and email that case, export the case to CD/DVD or create a patient CD with the case.

Note: Only images that you have available in Cornerstone on the Image Explorer window can be included in case emails, exported cases or case patient CDs. Images and other files that are attached to the case by using the Thumbnails pane on the Case Detail dialog box are not included.

Note: The patient CD viewing software requires Java™ version 1.5, which is included on the disk.

Note: To email cases, you must have an email system configured on your computer.

Creating a Case with Images Available in Cornerstone

To create a case from the Image Explorer:

1. Select one or more images, series, or studies on the Image Explorer window.
2. Click **New Case**, or right-click and select **New Case**. The Select Images dialog box appears.
3. Do the following:
   - Select **Image** to create a case with only the images you have selected.
   - Select **Series** to create a case with the series to which the selected images belong.
   - Select **Study** to create a case with the study to which the selected images belong.
4. Click **Select**. The Case Detail window appears.
5. If the Case Information pane is not open, click **Expand>>.**
6. In the **Case Title** text box, type a name for this case.
7. In the **Staff / User** drop-down list, select the staff member or Cornerstone software user associated with this case.
8. In the **Case Categories** list, select a category that you want to assign to this case. If you want to select more than one category, hold down the CTRL key while you select the categories you want.

   Note: You can select case categories when using the Advanced Search tab on the Image Explorer Window.

9. If you do not want to do anything else with this case, click **Save and Exit**. If you want to do a case action, follow the instructions later in this section.

To create a case from the Image Viewer:

1. To select the image that you want to use to create a case, click the image thumbnail in the thumbnail pane so that a red border is displayed around the thumbnail.

   Note: When viewing dental images in template mode, you can select images in either the template pane or the overflow pane.
2. Right-click the thumbnail, and select **Send** to from the menu.
3. In the Select Action area of the Select Images dialog box, select **New Case**.
4. Do the following:
   - Select **Image** to create a case with only the images you have selected.
   - Select **Series** to create a case with the series to which the selected images belong.
   - Select **Study** to create a case with the study to which the selected images belong.
5. Click **Select**. The Case Detail window appears.
6. If the Case Information pane is not open, click **Expand>>**.
7. In the **Case Title** text box, type a name for this case.
8. In the **Staff / User** drop-down list, select the staff member or Cornerstone software user associated with this case.
9. In the Case Categories list, select a category that you want to assign to this case. If you want to select more than one category, hold down the CTRL key while you select the categories you want.

   Note: You can use case categories when using the Advanced Search tab on the Image Explorer Window.
10. If you do not want to do anything else with this case, click **Save and Exit**. If you want to do a case action, follow the instructions later in this section.

To add images to a case from the Image Explorer:

Images can be added to cases, if necessary. Updated cases can be resent to a consulting radiologist or telemedicine service for repeat consultations.

1. Select one or more images, series, or studies on the Image Explorer window.
2. Click **Add to Case**, or right-click and select **Add to Case**. The Select Images dialog box appears.
3. Do the following:
   - Select **Image** to create a case with only the images you have selected.
   - Select **Series** to create a case with the series to which the selected images belong.
   - Select **Study** to create a case with the study to which the selected images belong.
4. Click **Select**. The Select Case dialog box appears.
5. In the **Select Case** drop-down list, select the case to which you want to add the images.
6. Click **OK**. The Case Detail window appears, and the information in the Case Details and Thumbnails area reflects the additional images.
7. If you do not want to do anything else with this case, click **Save and Exit**. If you want to do a case action, follow the instructions later in this section.

To add images to a case from the Image Viewer:

Images can be added to cases, if necessary. Updated cases can be resent to a consulting radiologist or telemedicine service for repeat consultations.

➢ To select the image that you want to add to a case, click the image thumbnail in the thumbnail pane so that red borders are displayed around the thumbnail.

Note: When viewing dental images in template mode, you can select images in either the template pane or the overflow pane.

Creating a Patient CD from a Case

When you create a patient CD from a case, the viewing software on the CD or DVD shows the images that are part of the case. Any text that you've added to the case on the Case Actions tab is recorded as a separate file on the CD or DVD.

To save patient CD information for a case to a file location:

Use this process if you want to bypass the patient CD process. You might do this if you want to put the images in an email or on a USB flash drive, or you might want to compile the information for patient CDs throughout the day and then burn the CDs at a later time using the CD burning capabilities in the Microsoft® Windows® operating system.

1. On the Case Detail window, if the Case Actions pane is not open, click **Expand>>.**
2. Click the **Patient CD** tab. The patient CD options are displayed.
3. Select **File Folder**, and type the file folder location in the text box, or click Browse and browse to the folder that you want to use.
4. Do one of the following:
   a. In the **Medical Notes/SOAP** text box, type any notes that you want saved on the CD. These notes will be saved in a text file labeled with the name of the case.
   b. To add medical notes/SOAP from the patient's medical history:
      i. Click **Medical History**.
      ii. Select the medical notes to include by using the Medical Notes/SOAP Selection Screen dialog box.
      iii. Click **OK**. The medical notes you have chosen are displayed in the Medical Notes/SOAP text box, where you are able to edit them.
5. If you want to add annotations or overlays to the JPEG files that will be included on the CD, click **Apply Annotations** and/or **Apply Overlays**.
6. Select a location in the **Save In** drop-down list and click **Save**.

Sending Cases via Email

The case feature allows you to email a case, with its images and any text that you have added on the **Case Actions** tab.

To email a case:

1. On the Case Detail window, if the Case Actions pane is not open, click **Expand>>.**
2. Click the **E-mail** tab. The email options are displayed.
3. In the **To** text box, type the email address for the specialist to whom you are sending the case, or select the address from your address book by doing the following:
   - Click **Address Book**. The Address Book dialog box appears.
   - Select an address and click **OK**. The address is displayed in the **To** text box.
4. Do one of the following:
   a. In the **Medical Notes/SOAP** text box, type any notes that you in the text file that will accompany the case. These notes will be saved in a text file labeled with the name of the case.

b. To add medical notes/SOAP from the patient's medical history:
   i. Click **Medical History**.
   ii. Select the medical notes to include by using the Medical Notes/SOAP Selection Screen dialog box.
   iii. Click **OK**. The medical notes you have chosen are displayed in the Medical Notes/SOAP text box, where you are able to edit them.

5. Select the type of file that the Cornerstone software should use to email the images in the **E-mail Attachment File Type** text box.
6. If you want to add annotations or overlays to the files that will be emailed, click **Apply Annotations** and/or **Apply Overlays**.
7. Do one of the following:
   • To email the case, select **Send**.
   • To save this case to send later, click **Save and Exit**.

   Note: If you receive a message or warning about the safety of sending the email, click **OK**.

Exporting Cases to a CD or DVD

You can create a CD or DVD containing case images and notes. Unlike the patient CD option, this method does not put a streamlined version of the Cornerstone Image Viewer on the CD or DVD, so the recipient of the disk will need to have software that can display the images.

To export a case to a CD or DVD:

1. On the Case Detail window, if the Case Actions pane is not open, click **Expand>>.**
2. Click the **Export** tab. The export options are displayed.
3. Select **CD/DVD** to save the case to a CD or DVD.

   Note: If you want to save the case to a file location select **File Folder** and choose a file location. You might do this if you wanted to save the case onto a USB flash drive, or to compile the burn the case onto CD at a later time using the CD burning capabilities in the Windows operating system
4. Do one of the following:
   a. In the **Medical Notes/SOAP** text box, type any notes that you want included in the text file that will accompany the case. These notes will be saved in a text file labeled with the name of the case.
   b. To add medical notes/SOAP from the patient's medical history:
      i. Click **Medical History**.
      ii. Select the medical notes to include by using the Medical Notes/SOAP Selection Screen dialog box.
      iii. Click **OK**. The medical notes you have chosen are displayed in the Medical Notes/SOAP text box, where you are able to edit them.
5. Select the type of file that the Cornerstone software should use to export the images in the **Export File Type text** box.
6. If you want to add annotations or overlays to the files that will be exported, click **Apply Annotations** and/or **Apply Overlays**.
7. Click **Export**. The files are copied to the selected disc.

Image file names and formats:

Image file names have the following format:

PatientName_OwnerLastName_ImageTitle_YYMMDD_PG.xxx

where YYMMDD is the date the image was captured, PG is the page number of the image, and .xxx is the type of file.

Text file names and formats:

Text file names have the following format:

PatientName_OwnerLastName_CaseTitle_YYMMDD.txt

The text files are described in the next section, “Text File Contents."

Text File Contents

A text file is sent with the case whenever you email a case, export a case to a CD/DVD, or create a patient CD with a case. This text file contains:

- Information about the case
- Patient information
- Client information
- Information about the images in the case
- Contact information for your practice

On a patient CD, this text file is included on the CD separately from the patient CD viewer, and can be accessed through the Windows® operating system.

IDEXX SmartLink Technology for Telemedicine

Overview

Using IDEXX SmartLink* technology for telemedicine, you are now able to use the Case feature to send cases to a telemedicine provider. You can see the status of the submission from the Image Explorer and, when a report comes back from the provider, you are able to open it from the Cornerstone* software.

Note: Because the case feature in Cornerstone Imaging does not include the ability to send and receive DICOM images, the telemedicine module work flow differs from what is available in the Diagnostic Imaging Module.

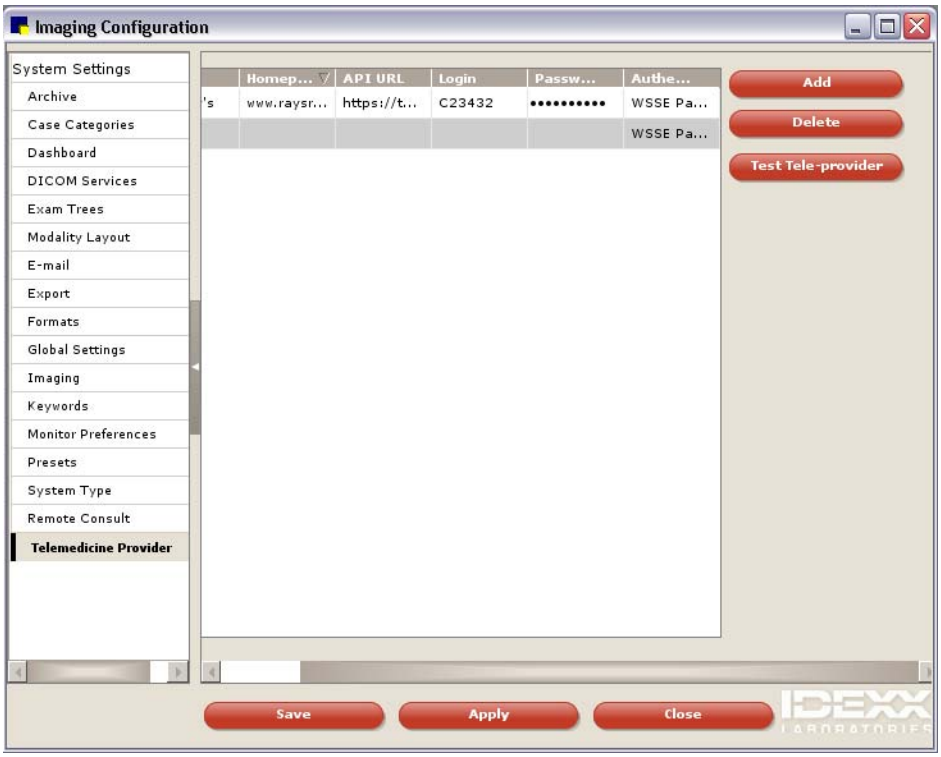
If you submit a case directly through the telemedicine provider's Web site, the status will still be visible on the Image Explorer and you will still be able to open reports from Cornerstone. In most cases, Cornerstone matches these submissions to the proper patient.

Setup

Setting Up SmartLink Technology for Telemedicine

To set up SmartLink technology for the telemedicine module:

1. On the menu bar, select **Controls> Defaults> Imaging**. The Imaging Configuration window appears.
2. On the left, click **Telemedicine Provider**. Telemedicine provider configuration table appears on the right.



3. To add a new provider, click **Add**.
4. In the row that appears, in the **Name** text box, type the name that you want to be displayed for this provider on the Case Detail dialog box.
5. Skip the **Homepage** text box—it has been provided to support future functionality.
6. In the **API URL** text box, type the Web address you use to reach the telemedicine provider. Be sure to start with "http://" or "https://" per the instructions of your telemedicine provider. For example, you would type https://api.vetmedstat.com/VMSIntegrations/VMSTMS.asmx for IDEXX Telemedicine Consultants.
7. In the **Login** and **Password** text boxes, type the login name and password you use to log into the telemedicine provider's site.
8. In the **Authentication** drop-down menu, choose the password authentication method that your telemedicine provider specifies.
9. Click the row you just entered to select it.
10. Click **Apply**.
11. Click **Test Tele-provider**. A message will appear, telling you whether the connection was successfully tested.
12. Click **Save** to save and close the Imaging Configuration window, or click **Apply** to save without closing the window.

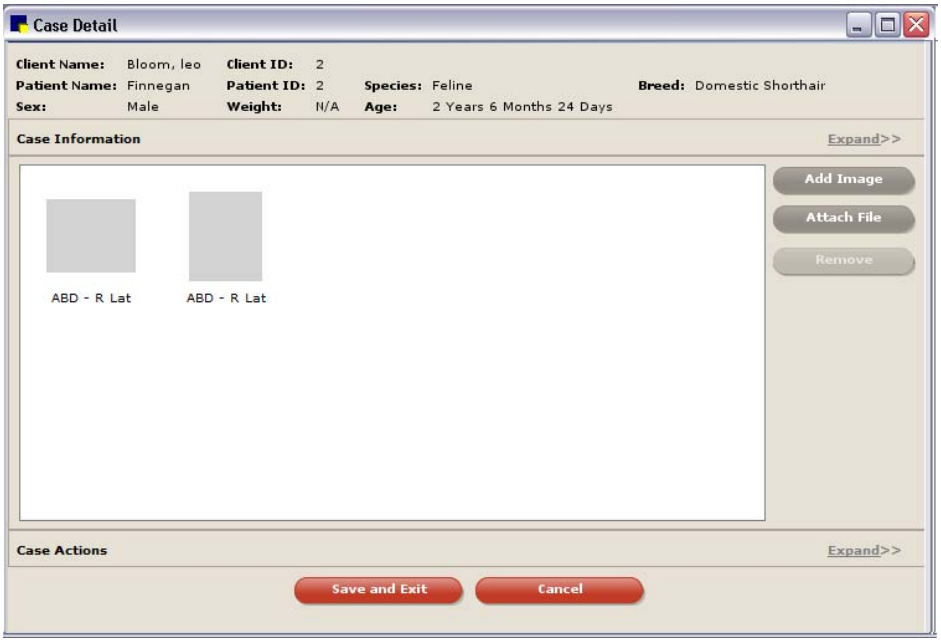
Use

Creating a Case and Adding Images

To create a case and add images in Cornerstone Imaging:

Note: Before you create a case in Cornerstone Imaging, you need to copy any images you want to attach to the case to a file location.

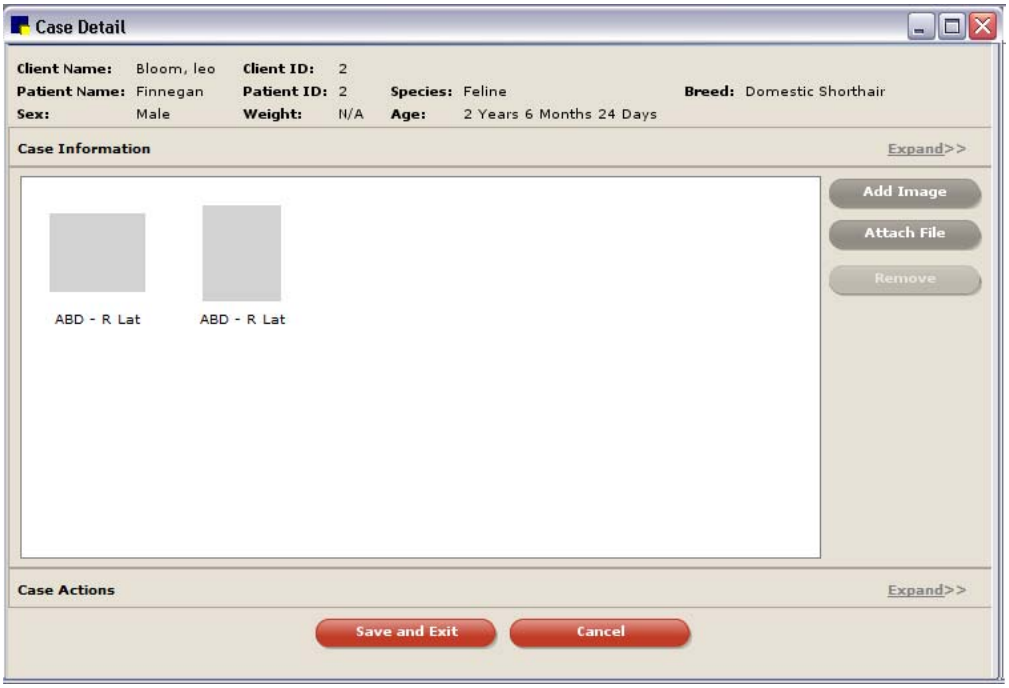
1. On the Patient Clipboard, in the *Patient History* area, right-click and select **New Case**. The Case dialog box appears.
2. In the **Case Title** text box, type a name for this case.
3. In the **Staff / User** drop-down list, select the staff member or Cornerstone software user associated with this case.
4. Expand the Thumbnails pane if it is not already open.



5. If you want to attach images and supporting material, do the following:
   a. Click **Attach File**. The Open dialog box appears.
   b. Use the dialog box to select the file(s) you want to add and click **Open**.
   c. Repeat these steps if you want to attach additional files.
6. If you want to remove an attachment or image, select its thumbnail and click **Remove**.

To create a case and add additional images in the Diagnostic Imaging Module:

1. Starting on either the Image Explorer or Image Viewer window, create a case that includes the images you wish to submit to the telemedicine provider. See section 4.2, “Creating and Managing Cases” in the *Cornerstone Diagnostic Imaging User’s Guide*.
2. On the Case Detail dialog box, expand the Thumbnails pane if it is not already open.



3. If you want to attach supporting material, do the following:
   a. Click **Attach File**. The Open dialog box appears.
   b. Use the dialog box to select the file(s) you want to add and click **Open**.
   c. Repeat these steps if you want to attach additional files.
4. If you want to attach additional images, do the following:
   a. Click **Attach**. A small version of the Image Explorer window appears, displaying thumbnail images for this patient.
   b. Click the image you wish to add, or hold down the CTRL key and select multiple images.
   c. Click **Select Image**. The images are added to the case.
5. If you want to remove an attachment or image, select its thumbnail and click **Remove**.

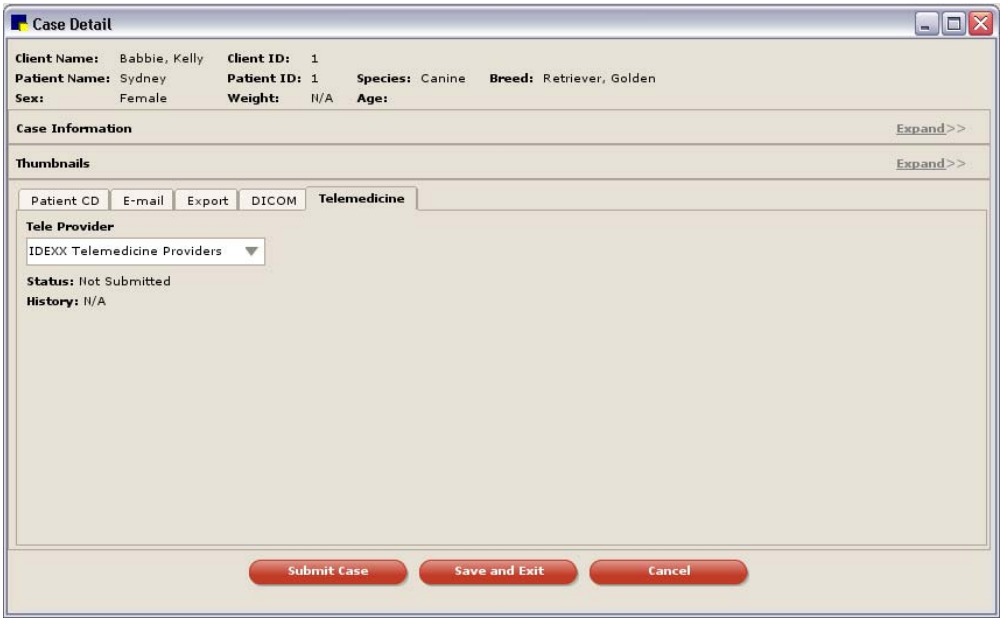
Submitting a Case to a Telemedicine Provider

To submit a case to a telemedicine provider:

1. On the Case Detail dialog box, expand the Case Actions pane.
2. Select the tab for the telemedicine provider you want to use or, if you have set up more than one telemedicine provider, select the **Telemedicine** tab and then select the provider you want from the **Tele Provider** drop-down list.
3. Click **Submit Case**. A Web browser opens and displays the provider's Web site.
4. Complete the information needed to submit the case:
   - Although patient data is automatically filled in, be sure to check that it is accurate.
   - Select the service to which you want to submit (such as cardiology or radiology).
   - Include relevant history and information about the presenting complaint.

5. When you complete the submission process, close the window for the telemedicine provider's Web site.

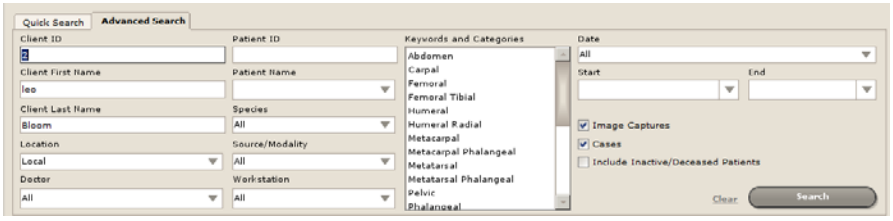
   Note: On the Case Detail dialog box in Cornerstone, you'll see that the **Submit Case** button is now the **View Case** button. Click this button to open a browser window to see the case on the telemedicine provider's Web site.



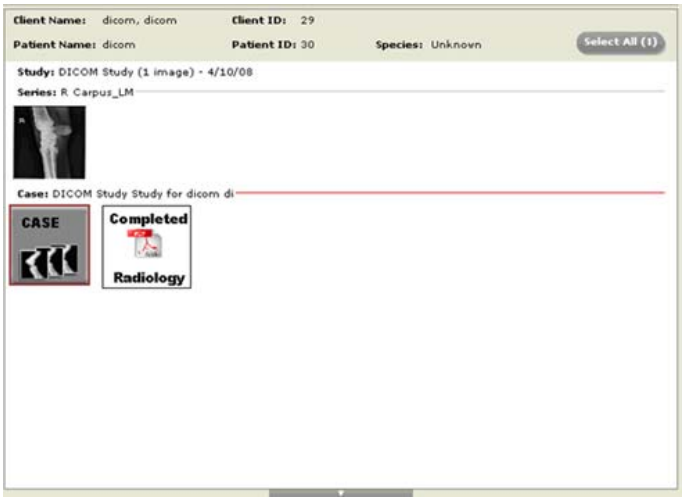
Viewing Case Status and Reports

To view the status of a telemedicine submission:

1. On the Patient Clipboard, right-click in the *Patient History* area and select **Image Explorer**.
2. Click the **Advanced Search** tab and make sure that the **Cases** text box is selected.



In the *Results Detail* area, a thumbnail is displayed on the left for the Case and thumbnails for each submission to the right. Generally, these thumbnails show a service to which the case has been submitted and the status of the submission for that service. The thumbnails are updated with the latest status every five minutes.



3. Double-click a submission thumbnail to see general details about the submission on the Case Actions pane of the Case Detail dialog box.
4. To view full details of the case, click **View Case**. A Web browser will open and display the information on the telemedicine provider's Web site.

Submission statuses:

Started	You have created a case and entered some or all of the information, but you have not yet submitted the case to a telemedicine provider. To submit the case, expand the Case Actions tab, select the tab for the telemedicine provider you want, and click **Submit**.
Sending	You have submitted the case. Information and image(s) are in the process of being sent.
Received	All images and information for the case have been received by the telemedicine provider. The case is ready for a specialist to read it.
In Process	A specialist is reading the case.
Attention!	A problem has occurred. Click the icon to find information about what has happened and what you should do. Situations in which you might see this thumbnail include: Case information was not successfully received. Additional information is needed by the specialist.
Cancelled	The submission has been cancelled.
Completed	The specialist has completed reading the case and sent a report back. Click the icon to read the report. (See the instructions below for further information.)

To view and print a report:

1. Double-click a submission thumbnail with a status of Completed. The report opens in the Adobe Reader® software (formerly Acrobat® Reader®).
2. If you want to print the report, click **Print** .

Working with Submitted Cases

To add images or other attachments after submitting a case:

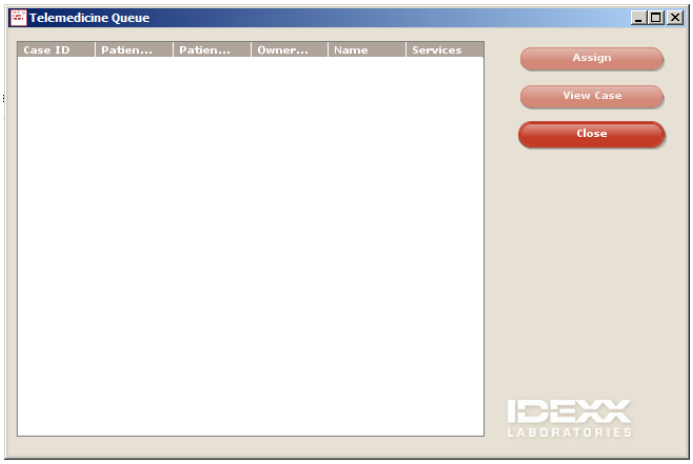
After a case has been submitted, you can no longer add images or other material to the case in Cornerstone. You need to use the attachment feature on the telemedicine provider's Web site instead.

1. On the Patient Clipboard, right-click in the Patient History area and select **Image Explorer**.
2. Click the **Advanced Search** tab and make sure that the **Cases** text box is selected.
3. Double-click a submission thumbnail. The submission Case Detail dialog box opens, displaying Case Actions pane and the tab for the telemedicine provider.
4. Click **View Case**. A Web browser will open and display the information on the telemedicine provider's Web site.
5. Use the attachment feature on the telemedicine provider's Web site to attach additional images or supporting material.
6. Close the provider's Web site.

To assign a telemedicine submission created outside of Cornerstone:

In most cases, if you submit a case to your telemedicine provider without using Cornerstone, Cornerstone will be able to match the submission status and any resulting reports to the proper patient in Cornerstone. If the status or report does not show up automatically, use the following process to manually match the submission to the patient.

1. On the menu bar, select **Activities> Imaging> Telemedicine Queue**. The Telemedicine Queue window appears and displays all telemedicine submissions that are not assigned to a patient.



2. To view a submission, select it in the table and click **View Case**. The Case Detail dialog box opens and displays the submission information.
3. To assign this submission to a patient, click **Assign**. The Select Client and Patient dialog box appears.
4. Type the patient's name or ID in the text box and click **Search**.
5. Select the patient in the table and click **Select**. A case containing this submission is created for this patient. Submission status is displayed on the Image Explorer window and you are able to view information or reports for the case on the Case Detail dialog box.

IDEXX Digital Radiography and Diagnostic Imaging

Note: If you have the Diagnostic Imaging module, you have the features described in this section as well as the features described in the preceding "Cornerstone Imaging" section.

The IDEXX I-Vision Mobile Application

With the IDEXX I-Vision Mobile* Application, you can use an iPad or Android™ tablet to view an IDEXX SmartLink* Digital Imaging request or send radiographs.

Setting Up the Application

To set up the IDEXX I-Vision Mobile Application on an iPad device:

1. Open the Safari browser.
2. Type **http://** followed by the IP address for your server and then type the following exactly:

   :8081/i-vision-mobile

   Note: The IDEXX representative who installed the IDEXX I-Vision Mobile Application should have given you the IP address.
3. Log in to the mobile application.
4. Tap and select **Add to Desktop**. Be sure to do this after logging in.
5. Close browser.
6. Tap **IDEXX I-Vision Mobile Application** desktop icon to start application. (From now on, always use the icon.)

To set up the IDEXX I-Vision Mobile Application on an Android tablet:

You'll need both the default Android browser and the Dolphin for Pad browser.

1. Open the default Android browser.
2. Type **http://** followed by the IP address for your server, then type the following exactly:

   :8081/i-vision-mobile

   Note: The IDEXX representative who installed the IDEXX I-Vision Mobile Application should have given you the IP address.
3. Log in to the mobile application.
4. Use the browser's bookmark feature to add a bookmark to your device's home screen. Be sure to do this after logging in.
5. Go to the Android Market and download the Dolphin for Pad browser.
6. Accept default settings in Dolphin setup wizard, except:

   ➤ On the User Agent screen, select **iPad**.
7. Tap , tap **Dolphin Settings** on the left, and select the **Full screen mode** check box.
8. Close browser.

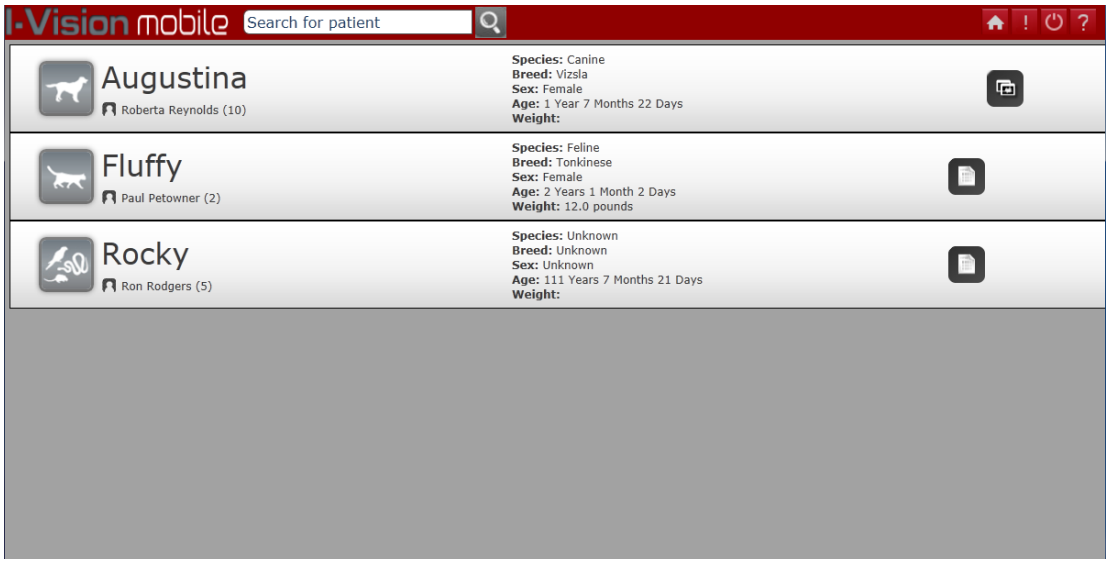
9. Tap **IDEXX I-Vision Mobile Application** desktop icon to start application. (From now on, always use the icon.)

To set up the application with IDEXX SmartLink Digital Imaging with Cornerstone:

1. On the Cornerstone* menu bar, select **Controls** > **Defaults** > **Imaging**, then click **Imaging** on the left. Imaging configuration settings appear.
2. In the *Tablet Settings* area, select the invoice item that you wish to use for all image requests created in the mobile application.

The Screens

Patient List



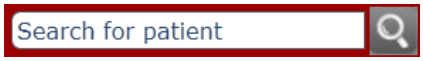
The mobile application opens on the **Patient List** screen. You can have this screen display:

- Patients currently checked in to the census list
- Patients who have recently had imaging activity
- Results of a patient search

When Patient List opens or you tap , the list shows:

- if displayed—checked-in patients (Census List)
- if displayed—patients with recent imaging activity (Imaging Dashboard)

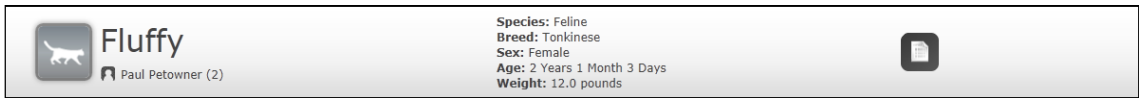
Tap / at any time to toggle view. This button is disabled when you search.



Fill in the **Search for patient** text box and tap to search.

Alerts are displayed for those patients who have image and/or telemedicine requests, either pending or completed:

- Radiograph request pending.
- Telemedicine request pending.
- New radiograph(s).
- New telemedicine report(s)



Tap patient bar to open Patient Summary screen.

Use the buttons in the upper right for application- and screen-level actions:

- Clear search.
- Show list of patients with alerts. Tap patient row to open Patient Summary.
- Log off.
- Display help.

  Note: To display help on the Dolphin browser, save the PDF, then tap to open.

Patient Summary

This screen shows the images for a patient. It's the jumping-off point for everything you can do in the mobile application.

Back to Patient List.

- Open image series.
- Close image series.

Tap one or more thumbnails, then tap:

- to send via DICOM
- to send to telemedicine
- to email

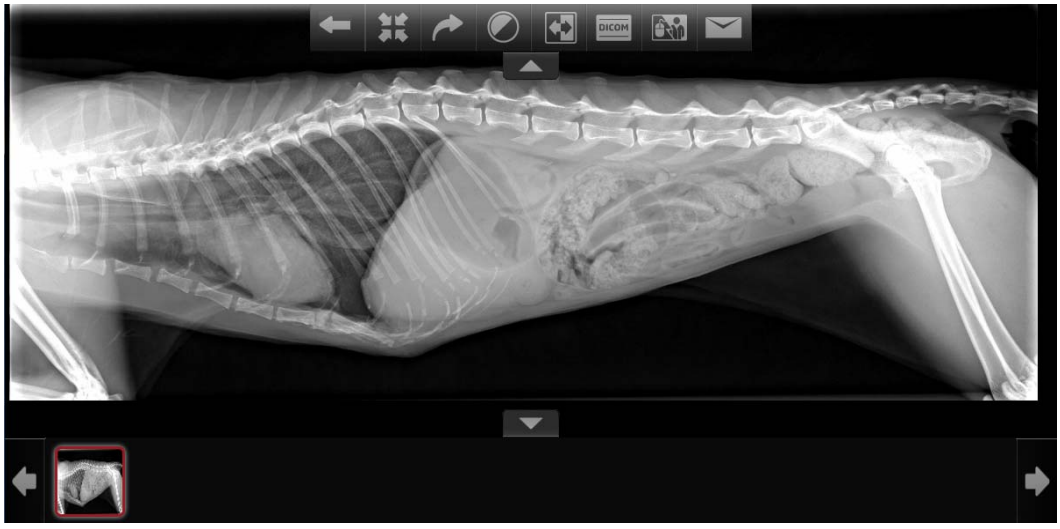
Tap a thumbnail to select it, then tap again to open the radiograph on Viewer.

Tap a telemedicine status to view submission status details or completed report.

Note: To display reports on the Dolphin browser, save the PDF, then tap to open.

Request radiographs on Request Screen.

Viewer



At top of screen:

• Tap to reveal enhancement tools.

• Tap to hide.

Tap tools:

Go back to Patient Summary.

Revert to image as originally displayed.

Rotate 90° clockwise.

Tap a new setting on the slide bars:
window (brightness) on vertical
level (contrast) on horizontal

Reverse light and dark.

Send via DICOM.

Send to telemedicine.

Email.

On the image (with either Safari or Dolphin™), do the following:

Pinch/spread to zoom out/in.

Swipe right to view previous radiograph.

Swipe left to view next radiograph.

On the image (with Safari only) do the following:

Swipe on a curve:

Left to right to rotate clockwise.

Right to left to rotate counter-clockwise.

Note: Be sure your fingers stay inside the image for the entire gesture.

At bottom of screen:

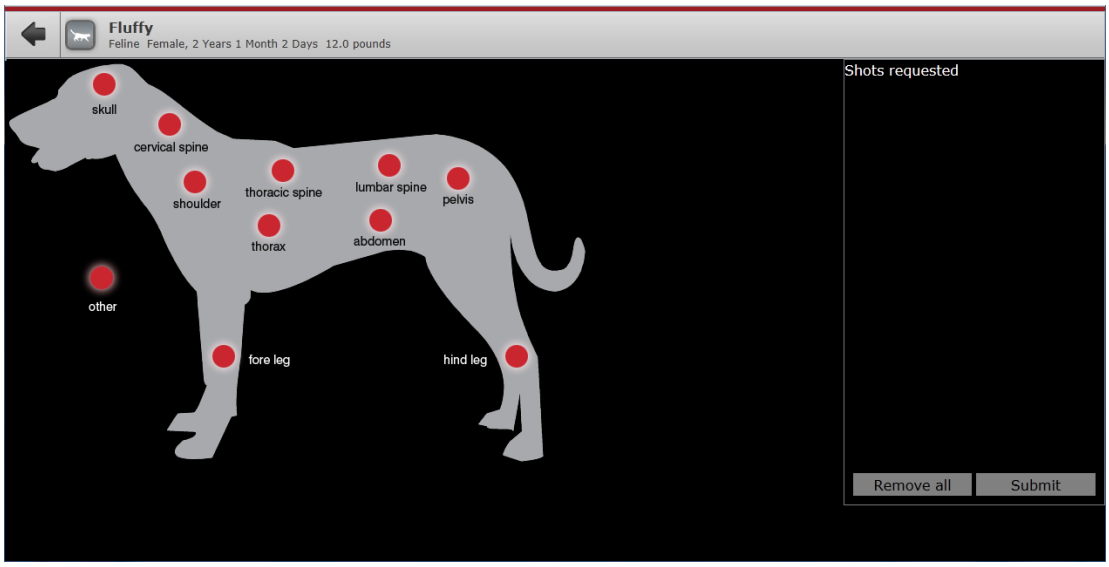
- Tap to reveal thumbnails
- Tap to hide.

Tap thumbnail to view or tap arrows:

View previous radiograph in image series.

View next radiograph in series.

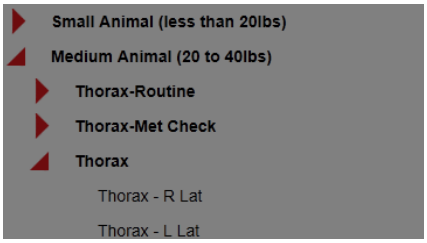
Request screen



Back to Patient Summary.

To request radiographs:

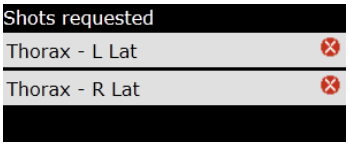
1. Tap a dot to see the top-level menu.
2. Tap to open a group in the menu.



3. Tap view(s) to select.

Note: Double-tap a group name to select the whole group.

Shots Requested shows views you've selected.



4. Tap ⊗ to remove a view.
5. Remove all Clear list.
6. Submit Submit request.

After you create a request, the request appears on the Imaging Dashboard in the Open Requests list in the lower right of the window.

If you are using Cornerstone, requests you create on a tablet will be visible in the same places as other imaging requests you create using IDEXX SmartLink Digital Imaging with Cornerstone. For more information about using SmartLink technology, see the *Cornerstone Diagnostic Imaging User's Guide*.

Note: To use the mobile application's request feature, you must have SmartLink Digital Imaging activated in Cornerstone.

Primary Workflows

Viewing Images

To view images:

1. Locate a patient on the Patient List screen.
2. Tap the patient.
3. On the Patient Summary screen, tap an image to select it, and tap again to view it.
4. See the Viewer instructions above for more information.

Sending Images

To email images:

1. Locate a patient on the Patient List screen.
2. Tap the patient.
3. On Patient Summary, select radiograph(s) and tap .

   Note: You can use the same button to email an image while you're on the Viewer.
4. Select **Image(s)**, **Series**, or **Study**.
5. Type To/From addresses and message and tap **Submit**.

To send images via DICOM:

1. Locate a patient on the Patient List screen.
2. Tap the patient.
3. On Patient Summary, select radiograph(s) and tap

.

   Note: You can use the same button to DICOM send an image while you're on the Viewer.

4. Select **Image(s)**, **Series**, or **Study**.
5. Select DICOM server for recipient and tap **Submit**.

To send images to a telemedicine provider:

1. Locate a patient on the Patient List screen.
2. Tap the patient.
3. On Patient Summary, select radiograph(s) and tap .

   Note: You can use the same button to send an image to a telemedicine provider while you're on the Viewer.
4. Select **Image(s)**, **Series**, or **Study**.
5. Select DICOM server for recipient and tap **Submit**.

Requesting Images

Note: To use the mobile application's request feature, you must have SmartLink Digital Imaging activated in Cornerstone.

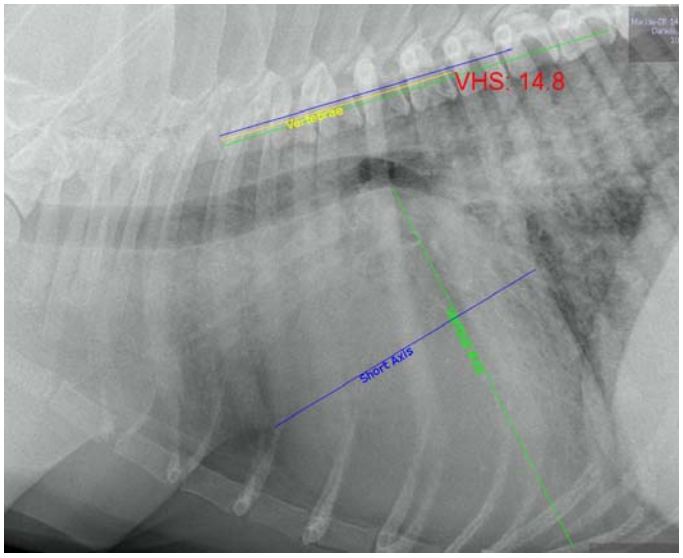
To request images:

1. Locate a patient on the Patient List screen.
2. Tap the patient.
3. On the Patient Summary screen, tap .
4. Follow the Request Screen instructions above for more information.

Determining Vertebral Heart Score

The Vertebral Heart Score (VHS) tool is used to measure the size of the heart in order to determine if it is enlarged.

The VHS is determined by measuring the length and width of the heart and then comparing these measurements to a section of the thoracic vertebrae. Essentially, you measure how many vertebrae long the heart is and how many vertebrae wide. The sum of the two measurements is the VHS.



Measure the length of the heart on the radiograph from the cranioventral border of carina to the cardiac apex. Find the width at the widest point on the cardiac image using a line perpendicular to the first line. The measurement on the thoracic vertebra should start from the cranial edge of the T4 vertebra and move in a caudal direction.

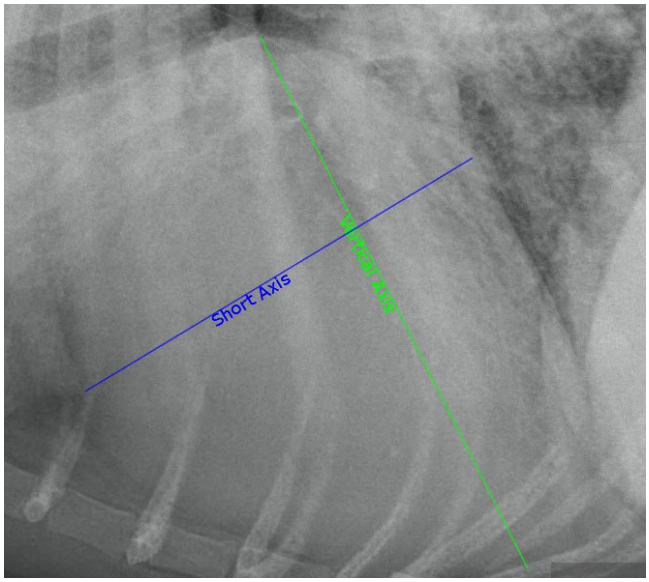
When you've made these measurements, you are able to determine the length and width of the heart in vertebral units (to one decimal place). The sum of the length and width is the VHS.

To use the VHS tool:

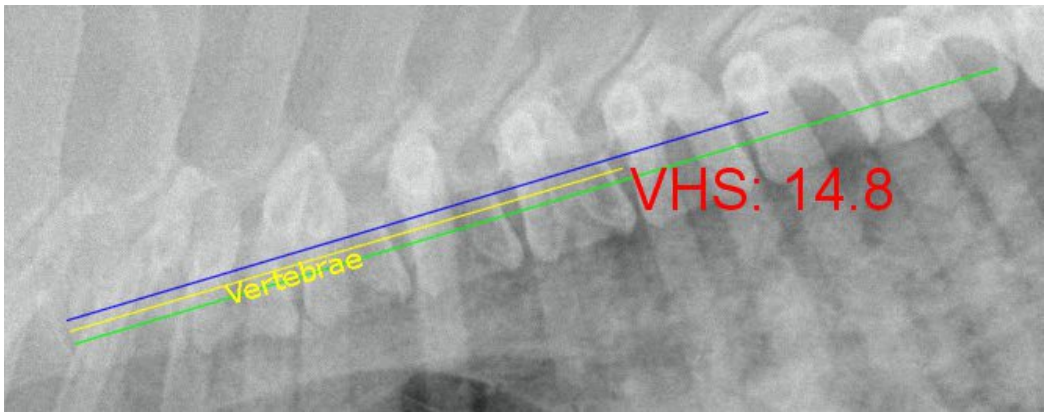
1. Open a thoracic lateral radiograph in the Image Viewer.
2. Click **Annotate** and then select **Vertebral Heart Score**.

   Two sets of lines appear on the image—a pair of crossed lines for measuring the heart and a set of three parallel lines for the vertebrae. The top and bottom vertebral lines are linked to the heart lines, and will change size as the heart lines are adjusted. The middle vertebral line is used to measure several vertebrae so that the software can calculate an average vertebra length. By default, this line will calculate based on a measurement of five vertebrae; to change this, see "To change VHS tool settings" below.

   The VHS value also appears. It is initially displayed as "N/A," but is calculated when you adjust the measurement lines.
3. Click **Zoom** and zoom in so that you can see the relevant details of the image. This will also make it easier to work with the lines.
4. Click the annotation **Pointer**.
5. Adjust the measurement lines on the image of the heart:
   a. Click on a line to move it into position. The heart lines are labeled "Short Axis" and "Vertical Axis" and can be moved independently.
   b. Click the handle on the end of a line and drag to change the size of the line.



6. Adjust the vertebral measurement line:
   a. Click on the middle line to move the set of vertebral lines into position.
   b. Click the handle on the left (caudal) end of the middle line and drag so that the line measures the width of five vertebrae (or a different number, if you have changed the tool settings).



7. Note the resulting VHS value.

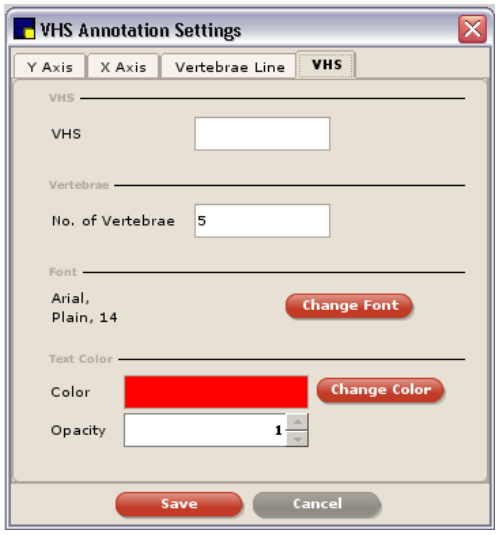
   Note: If you have set up the Vital Signs feature, you can record the VHS as a vital sign. See the *Cornerstone User's Manual* or the Cornerstone Help system for more information about recording vital signs in Cornerstone.

   Note: Although the VHS is automatically recalculated, you can recalculate the VHS at any time by right-clicking any line or text in the annotation and selecting **Calculate VHS**.

8. Save the annotation by clicking **Save** and selecting **Save** from the drop-down menu.

To change VHS tool settings:

1. After you have placed the VHS measurement lines on a radiograph, click on any of the VHS lines, then right-click. The VHS Annotation Settings dialog box appears.
2. On the VHS tab, you can change the following:
   - Type a number in the **No. of Vertebrae** text box to set the number of vertebrae you will measure with the vertebrae line so that the software can calculate average vertebra width.
   - Use the options in the **Font** and **Text Color** areas to change how the VHS value is displayed.



3. If you want to change the way the measurement lines are displayed, click the tab for the **Vertebrae Line**, **X Axis** (vertical axis), or **Y Axis** (short axis), and do the following:
   - Change the color and opacity of the line in the **Outline Color** area.
   - Select a line pattern (e.g., solid or dashed) in the **Line Pattern** drop-down menu.
   - Change the line thickness in the **Size** text box.

Setting Up Unique Imaging Email Accounts by User

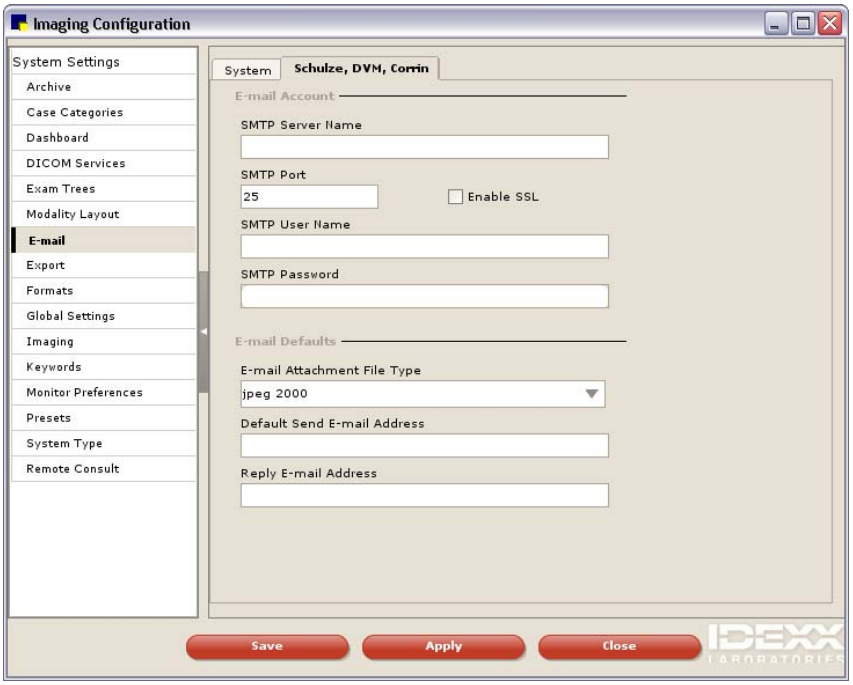
You can now set up the email feature within the Digital Imaging Module so that it will send emails from a particular account for the staff member who is logged in.

If you set up a particular email account to be used for a staff member, that account will be used for emails sent from the Image Explorer, Image Viewer or the **Email** tab of the Case Actions pane on the Case Detail dialog box when that staff member is logged in to Cornerstone.

If you do not set up an email account for a staff member, Digital Imaging emails will use the account that has been set up at the system level.

To set up Digital Imaging email to use staff-member specific email:

1. On the menu bar, select **Controls> Defaults> Imaging**. The Archive Images window appears.
2. On the left, click **Email**. Email configuration options appear on the right.



3. Click the tab with the staff member's name.
4. In the **SMTP Server Name** text box, type the name of your email server.
5. In the **SMTP User Name** and **SMTP Password** text boxes, type the information that Cornerstone needs to log into your email server.
6. In the **E-mail Attachment File Type** drop-down menu, select the type of file to use for sending images. This default can be changed when emailing images.
7. In the **Default Send E-mail Address** text box, type the address to be listed as the sender.
8. In the **Reply E-mail Address** text box, type the address to which the recipient should reply.
9. Click **Save** to save and close the Imaging Configuration window, or click **Apply** to save without closing the window.

To set up the system-level Digital Imaging email account:

1. On the menu bar, select **Controls> Defaults> Imaging**. The Archive Images window appears.
2. On the left, click **Email**. Email configuration options appear on the right.
3. Click the **System** tab.
4. In the **SMTP Server Name** text box, type the name of your email server.
5. In the **SMTP User Name** and **SMTP Password** text boxes, type the information that Cornerstone needs to log into your email server.
6. In the **Default E-mail Attachment File Type** drop-down menu, select the type of file to use for sending images. This default can be changed when emailing images.
7. In the **Default Send E-mail Address** text box, type the address to be listed as the sender.
8. In the **Reply E-mail Address** text box, type the address to which the recipient should reply.
9. Click **Save** to save and close the Imaging Configuration window, or click **Apply** to save without closing the window.

IDEXX SmartLink Digital Imaging

Overview

IDEXX SmartLink* Digital Imaging allows an exchange of information between Cornerstone* software and IDEXX Digital Imaging Systems. This allows you to request digital images electronically anywhere in the clinic, instantly capturing requests and charges in patient records and on invoices. This integration reduces missed charges and preserves x-ray revenue.

In Cornerstone 8.1 and earlier versions, SmartLink Digital Imaging requests were handled on a per shot basis, so each shot required its own invoice item. Cornerstone 8.2 provides a more flexible image request work flow with the introduction of the **Image Request special action** feature, making it easier for practices to bill for radiology services.

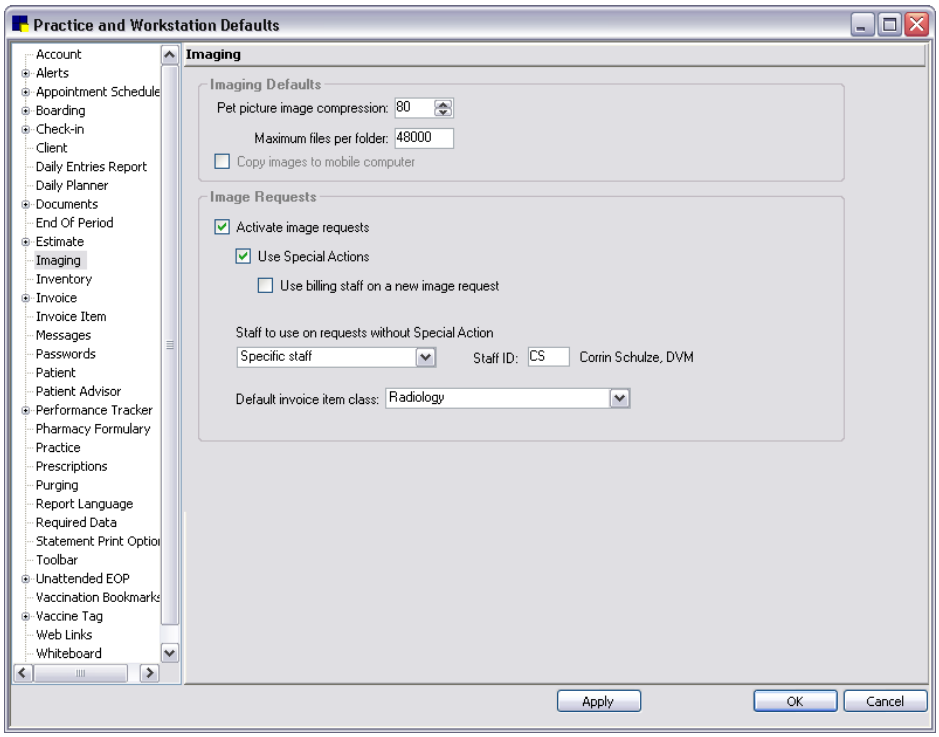
The Image Request special action can be set up for all of your imaging invoice items so that an image request is automatically initiated when the item is added to a Patient Visit List or invoice.

Note: The SmartLink Digital Imaging functionality for processing image requests is available to those practices that have purchased an IDEXX Digital Radiology unit for use with Cornerstone software. Contact your IDEXX Cornerstone sales representative at 1-888-224-4408 for information on purchasing this module.

Setup

Imaging Defaults

For those practices with IDEXX SmartLink Digital Imaging activated, new Imaging defaults allow you to enable special actions to create image requests, specify a default staff to be associated with different types of image requests, and specify a default invoice item classification for imaging items.



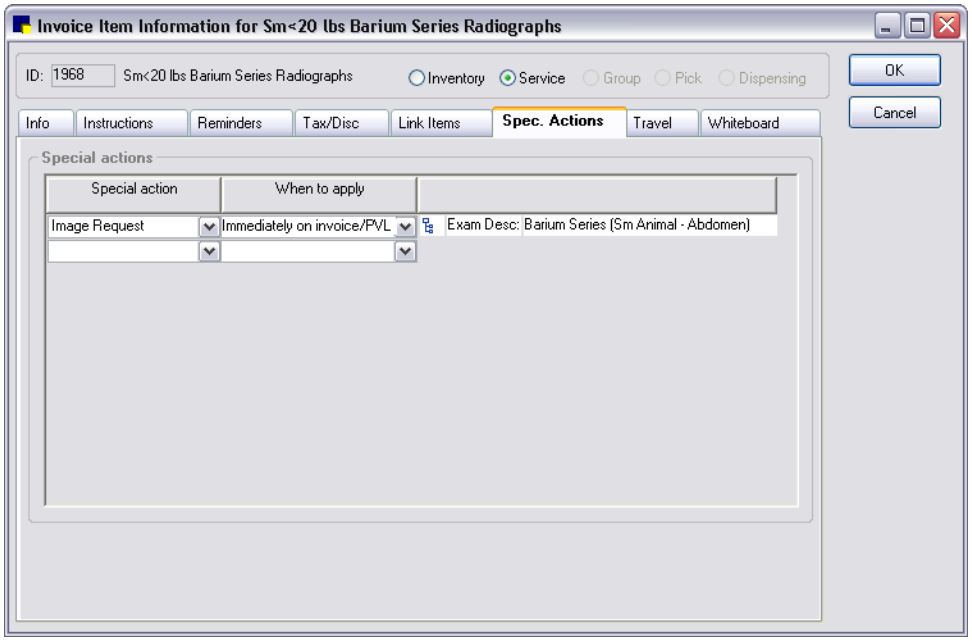
New settings in the Imaging defaults *Image Requests* area include:

- **Activate image requests –** If you purchase IDEXX SmartLink Digital Imaging, this option activates the feature.
- **Use Special Actions –** If selected, invoice items set up to initiate the Image Request special action will activate the New Image Requests dialog box when the item is added to the Patient Visit List (PVL) or invoice for a patient.
- **Use billing staff on a new image request –** If **Use Special Actions** is selected, you can select this option to use the billing staff on the PVL or invoice as the staff who will be associated with an image request when the request is initiated using a special action. If this option is not selected, the default staff is based on the last staff member who performed an image request on that workstation.
- **Staff to use on requests without Special Action –** You can specify the default staff to associate with an image request that is created without the use of a special action. Options include:
    - **No default staff –** No default staff will be associated with the image request, requiring you to select a staff at the time the request is created.
    - **Last staff used on workstation –** Uses the last staff member who performed an image request on that workstation.
    - **Specific staff –** Designate a specific staff member by typing the staff ID or pressing F2 to search for and select a staff member from the Staff List.
- **Default invoice item class –** Allows you to specify a default classification (e.g., Radiology) to narrow the list of items displayed when creating an image request. This allows you to filter out non-imaging invoice items and speed up the search process.

Setting Up an Invoice Item to Initiate the Image Request Special Action

A special action is an option you can set up for an invoice item so that use of the item on the Patient Visit List (PVL) or invoice will automatically prompt Cornerstone to perform a certain action. With the new Image Request special action available in Cornerstone 8.2, invoice items set up to initiate the Image Request special action will activate the New Image Request dialog box when the item is added to the Patient Visit List (PVL) or invoice for a patient.

The Image Request special action can be set up for an item on the Invoice Item Information window's **Spec. Actions** tab.



Note: In order to set up an invoice item to initiate an Image Request special action, SmartLink Digital Imaging must be activated.

Note the following when setting up an Image Request special action for an invoice item:

- The Image Request special action can be placed on service-type items only (**Service** must be selected as the item type at the top of the Invoice Item Information window).
- Image Request special actions cannot be attached to invoice items that have linked items (on the **Link Items** tab).
- Only one Image Request special action can be applied to an invoice item.

To set up an Image Request special action for an invoice item:

1. With a service-type invoice item open for updating on the Invoice Item Information window, click the **Spec. Actions** tab.
2. From the **Special action** drop-down list, select **Image Request**.

   Note: The **When to apply** setting is automatically set to **Immediately on invoice/PVL**, as this is the only available option for this particular special action.
3. If you want to select shots to be associated with this item by default, click the **Shot Selection** icon. The Shot Selection dialog box appears.

   Note: The **Shot Selection** icon displays as a shot tree with a "+" sign if shots have not been added for the item and as a standard shot tree (no "+" sign) if shots have already been selected for this invoice item.
4. Select all image shots to be associated with this invoice item by default, then click **OK** to return to the invoice item's **Spec. Actions** tab. (See "Selecting Image Shots on the Shot Selection Dialog Box" on page 61 for more information on selecting image shots.)

   Note: You are not required to select default image shots for the item during setup. If desired, you can set up the invoice item with no shots selected and instead add request notes in the **Exam Description** field so the technician can select the shots when completing the request.

5. If you want specific request notes to display with this invoice item by default when an image request is made for this item, in the **Exam Desc.** field, type a brief description (up to 64 characters) of the shots to be taken.

   Tip: To specify whether staff with security privileges can change pricing for image shots, select the desired **Allow change** option on the Invoice Item Information window's **Info** tab for the item. For example, you can select **Only increases**, which allows the price to be increased but never decreased (except by a user with administrator security privileges). See the *Cornerstone Administrator's Manual* or the Cornerstone Help system for more information on the **Allow change** options.

Current SmartLink Digital Imaging Practices—Optimizing Your Imaging Invoice Item Setup

If your practice is currently using SmartLink Digital Imaging with Cornerstone, you most likely have many imaging invoice items that were set up to follow the "one image shot per invoice item" method that was previously required. In earlier Cornerstone versions, imaging invoice items were set up and maintained using the Imaging Invoice Item Setup and Imaging Invoice Item Maintenance windows that were available on the **Activities** menu. In Cornerstone 8.2, the functionality previously available in these two windows has been replaced with the Image Request special action setup ability. When you install Cornerstone 8.2, any imaging invoice items with linked shots will be automatically set up with the Image Request special action and the applicable shot will be selected in the shot tree.

Upon installing Cornerstone 8.2, you have several imaging invoice item setup options:

- **Option 1 (recommended) –** You can reconfigure your current imaging invoice item setup to take advantage of the new "multiple image shots per invoice item" flexibility that's available in Cornerstone 8.2. This will allow you to consolidate many of your existing invoice items to result in fewer items and a more efficient image request and capture work flow. To accomplish this, you'll want to delete or mark many of your current single-shot items as Inactive and create new invoice items that include multiple shots or a series of shots.

  Note: For assistance with quickly deleting unused imaging invoice items and optimizing your imaging invoice item setup in Cornerstone 8.2, contact Cornerstone Support at 1-800-695-2877.

- **Option 2 –** You can leave your imaging invoice item setup exactly the same. Note, however, that each image shot you request will display as a separate line item (or job) listed on the Image Requests and Results window. Using this "one image shot per invoice item" method will likely require more time for processing image requests.

Use

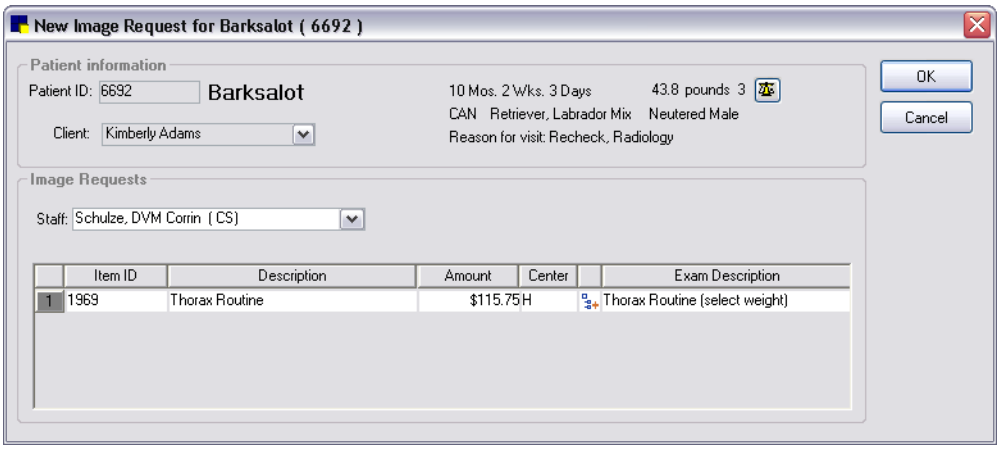
Creating an Image Request During Invoicing (Special Action Method)

With the new Image Request special action available in Cornerstone 8.2, invoice items set up to initiate the Image Request special action will activate the New Image Request dialog box when the item is added to the Patient Visit List (PVL) or invoice for a patient.

Note: In order to create an image request using the special action method, SmartLink Digital Imaging must be activated and the **Use Special Actions** option must be enabled in **Controls > Defaults > Practice and Workstation > Imaging**. In addition, your imaging invoice items must be set up to initiate the Image Request special action.

To create an image request during invoicing (basic steps):

1. Add an imaging invoice item to the PVL or invoice for a patient. The New Image Request dialog box appears.



2. Enter the ID of the staff member responsible for the image requests by typing the ID or selecting the staff from the drop-down list.
3. To add or edit image shots for an invoice item in the image requests grid, click the item's **Shot Selection** icon and specify the image shots to be captured for this item. (See "Selecting Image Shots on the Shot Selection Dialog Box" on page 61 for more information on selecting image shots.)

   Note: The **Shot Selection** icon displays as a shot tree with a "+" sign if shots need to be added for the item and as a standard shot tree (no "+" sign) if shots have already been selected for this invoice item.
4. If necessary, enter or edit request notes for an imaging invoice item in its **Exam Description** field (up to 64 characters).

   Note: If image shots have not been selected for the item, then an Exam Description is required.
5. Repeat steps 3–4 as needed for each invoice item listed in the image requests grid.
6. When you are finished, click **OK**.

Creating an Image Request from the Patient Clipboard (Manual Method)

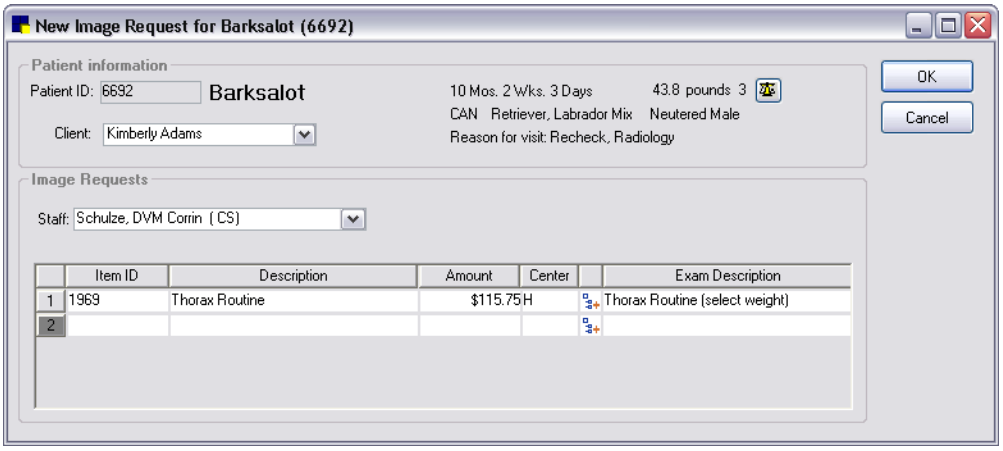
If desired, you can create an image request using the **Imaging > Image Request** right-click menu option on the Patient Clipboard.

Note: In order to create an image request using the manual method, SmartLink Digital Imaging must be activated.

To create an image request from the Patient Clipboard (basic steps):

1. With the patient's record open on the Patient Clipboard, in the *Patient list* area, right-click the patient's name and select **Imaging > Image Request**. The New Image Request dialog box appears.

   Note: You can also access the New Image Request dialog box by clicking **New** on the Image Requests and Results window.



2. Enter the ID of the staff member responsible for the image requests by typing the ID or selecting the staff from the drop-down list.
3. In the image request grid's next available **Item ID** field, enter an item ID by either typing the ID or pressing F2 to search for and select the item from the Invoice Item List.

   Note: To delete an item from the grid, click in the item's **Item ID** field and press CTRL+D.
4. If necessary, change the price for the item in the **Amount** field.

   Note: You may not be allowed to change the item's pricing, based on the **Allow change** setting for this item (on the Invoice Item Information window's **Info** tab). If changes are allowed, you may be required to select a price change reason.
5. In the **Center** field, type the revenue center ID or press F2 to search for and select from the Revenue Center List.
6. To add image shots for the item, click its **Shot Selection** icon and specify the image shots to be captured for this item. (See "Selecting Image Shots on the Shot Selection Dialog Box" on page 61 for more information on selecting image shots.)

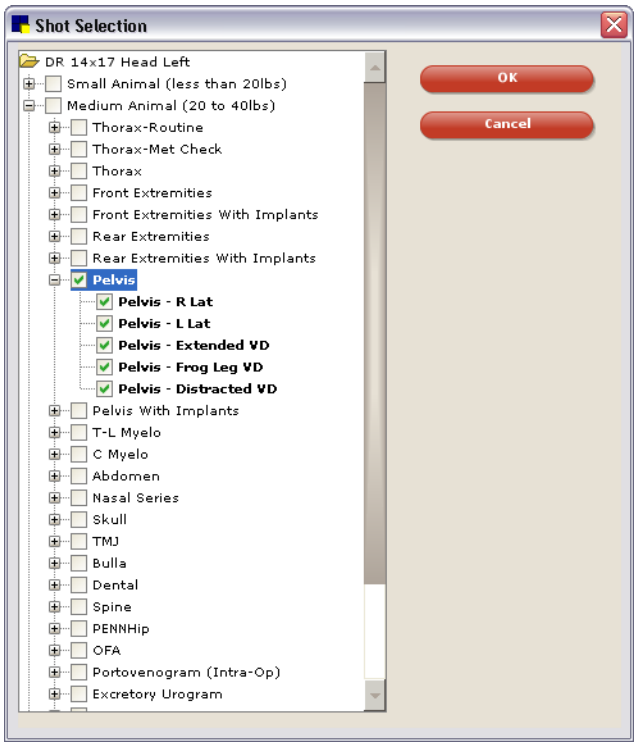
   Note: If the invoice item has an Image Request special action associated with it, the image shot defaults and exam description defined for the special action will be selected by default.
7. If desired, enter capture notes for the item in its **Exam Description** field (up to 64 characters).

   Note: If image shots have not been selected for the item, then an Exam Description is required.
8. Repeat steps 3–7 until all imaging invoice items that apply to the patient are selected.
9. When you are finished, click **OK**.

Each invoice item line is added to the Image Request and Results window as its own separate image request.

Selecting Image Shots on the Shot Selection Dialog Box

The Shot Selection dialog box allows you to easily select the image shots to be associated with each of your imaging invoice items.



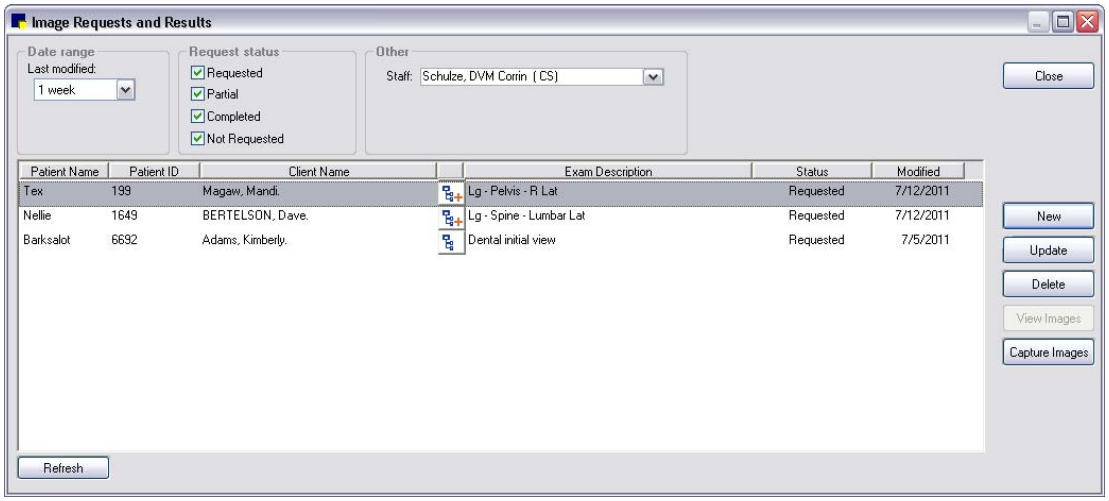
To select image shots on the Shot Selection dialog box:

1. Double-click to open the shot tree for the applicable IDEXX modality.
2. Click the plus sign [+] to the left of the desired species or animal category to which the image shot(s) apply. A list of image shots appears.
3. Click the check box to the left of the individual shots needed, or click the check box to the left of a group (anatomical region) to choose all shots within that heading.
4. When you have selected all desired shots, click **OK** to close the dialog box.

Managing Image Requests and Results

The Image Requests and Results window is a central location where you can see the status of your image requests. In Cornerstone 8.2, this window has been enhanced to provide the following new features:

- Additional filter options for narrowing the list of image requests displayed.
- A **Shot Selection** icon that allows you to view image shots selected for a request.
- A **View Images** button that allows you to open Completed, Partial or Not Requested images in the Image Viewer.



To manage image requests and results:

1. Click the Image Requests and Results button on the toolbar. The Image Requests and Results window appears.
2. To narrow the list of image requests displayed, do one or more of the following:
   - If you want to narrow the list of image requests displayed to only view requests modified within a specific time frame, select a **Last modified** timeframe in the *Date range* area.
   - If you want to narrow the list of image requests displayed to only view requests having a particular status, select or deselect the check boxes in the *Request status* area.
     - **Requested** items are radiographs for which images have not yet been captured.
     - **Completed** items are requested radiographs that have been captured.

       Note: If an image request does not have any default image shots assigned, the request is considered Complete if any shots are captured for the request.

       Note: If you have filtering options set to display Completed items with the **Last modified** timeframe set to All, the image request list will display Completed items for only the last 31 days.
     - **Partial** items are image requests where some of the radiographs have been completed and some have not.
     - **Not Requested** items are additional radiographs that been taken but are not part of an image request.
   - If you want to narrow the list of image requests displayed to only view requests assigned to a particular staff member, select the staff from the **Staff** drop-down list in the *Other* area (default is All Staff).
3. If you want to verify the image shots that have been selected for a request, click the request's **Shot Selection** icon to open the Shot Selection dialog box in view-only mode. Any image shots previously assigned to the request will be selected in the shot tree. (To change the shots selected for this request, you must update the request.)

Note: The **Shot Selection** icon displays as a shot tree with a "+" sign if shots need to be added for the item and as a standard shot tree (no "+" sign) if shots have already been selected for this invoice item.

4. Use the buttons on the Image Requests and Results window to perform any of the following tasks:

   Note: The **New**, **Update** and **Delete** button tasks can also be selected by right-clicking an image request line and selecting the task from the pop-up menu.

   - To create a new image request, click **New** and create the request using the options on the New Image Request dialog box.
   - To update an image request with a status of Requested, Partial or Not Requested, select the request and click **Update**. Depending on the status of the request, different updating options are available.
   - To delete an image request with a status of Requested, select the request and click **Delete**.
   - To view images for a request with a status of Completed, Partial or Not Requested, select the request and click **View Images**. The image or images associated with the request open in the Image Viewer.
   - To capture images for a request with a status of Requested or Partial, select the request and click **Capture Images**. (Note: The **Capture Images** button is enabled only when using an IDEXX-DR™ or IDEXX-CR™ capture workstation.)
   - To view the most current information in the Image Requests list, click **Refresh**.

5. When you are finished, click **Close**.

Image Request Special Action Item Report

The new Image Request Special Action Item Report in Cornerstone 8.2 provides a listing of service-type invoice items that have been set up to initiate the Image Request special action. Fields listed on the report include item ID, invoice item description, amount, exam description and any preselected shots associated with the item. The new report is available in the Invoice Item report group.

- Sort options for the report include invoice item description and invoice item ID.
- Range options include invoice item description and invoice item ID.

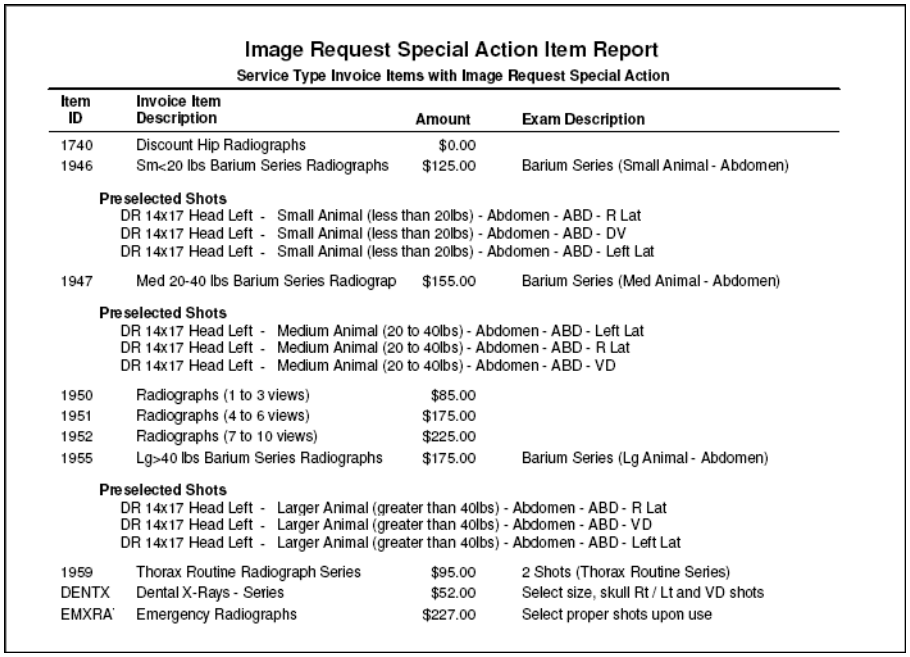


Image Request Special Action Item Report

Service Type Invoice Items with Image Request Special Action

Item ID	Invoice Item Description	Amount	Exam Description
1740	Discount Hip Radiographs	$0.00	
1946	Sm<20 lbs Barium Series Radiographs	$125.00	Barium Series (Small Animal - Abdomen)
	Preselected Shots		
	DR 14x17 Head Left - Small Animal (less than 20lbs) - Abdomen - ABD - R Lat		
	DR 14x17 Head Left - Small Animal (less than 20lbs) - Abdomen - ABD - DV		
	DR 14x17 Head Left - Small Animal (less than 20lbs) - Abdomen - ABD - Left Lat		
1947	Med 20-40 lbs Barium Series Radiograp	$155.00	Barium Series (Med Animal - Abdomen)
	Preselected Shots		
	DR 14x17 Head Left - Medium Animal (20 to 40lbs) - Abdomen - ABD - Left Lat		
	DR 14x17 Head Left - Medium Animal (20 to 40lbs) - Abdomen - ABD - R Lat		
	DR 14x17 Head Left - Medium Animal (20 to 40lbs) - Abdomen - ABD - VD		
1950	Radiographs (1 to 3 views)	$85.00	
1951	Radiographs (4 to 6 views)	$175.00	
1952	Radiographs (7 to 10 views)	$225.00	
1955	Lg>40 lbs Barium Series Radiographs	$175.00	Barium Series (Lg Animal - Abdomen)
	Preselected Shots		
	DR 14x17 Head Left - Larger Animal (greater than 40lbs) - Abdomen - ABD - R Lat		
	DR 14x17 Head Left - Larger Animal (greater than 40lbs) - Abdomen - ABD - VD		
	DR 14x17 Head Left - Larger Animal (greater than 40lbs) - Abdomen - ABD - Left Lat		
1959	Thorax Routine Radiograph Series	$95.00	2 Shots (Thorax Routine Series)
DENTX	Dental X-Rays - Series	$52.00	Select size, skull Rt / Lt and VD shots
EMXRA	Emergency Radiographs	$227.00	Select proper shots upon use

Note: The Image Request Special Action Item Report allows you to view all imaging invoice items in a single list. In Cornerstone 8.2, this report listing should be used as your reference for all imaging invoice items and their associated image shots (versus viewing the items on the Imaging Invoice Item Maintenance window that was previously available in Cornerstone).

Additional Updates

- The Image Request windows for adding and updating image requests have been updated to include the new **Shot Selection** icon, as well as an **Exam Description** field. These windows also now provide the patient's primary and secondary reasons for visit, as well as the **Vital Signs/Weight** button for accessing/updating weight and vital signs information for the patient.
- The Imaging Dashboard window now displays the image request Exam Description, if one exists.
- The **Activities > Imaging > Setup Imaging Invoice Items** and the **Activities > Imaging > Maintain Imaging Invoice Items** menu options are no longer available in Cornerstone, as the functionality previously provided on these windows is now handled through the Image Request special action process and the new Image Request Special Action Item Report.

Miscellaneous

New Installation Requirements for this Release

- The IDEXX Cornerstone 8.2 release is distributed on DVD, which will require at least one networked computer in the practice with a DVD drive.
    - If a DVD drive is not available on the server, you can install across the network from a shared DVD drive on another computer. See the *Cornerstone 8.2 Installation Guide* for detailed instructions.
    - If you do not have a computer with a DVD drive, please contact your IDEXX Practice Solutions representative at 1-888-224-4408 for hardware upgrade or alternate media solutions.
- Cornerstone 8.2 software cannot be installed on the Windows® 2000 or Windows® 2000 Server operating systems. For updates on Cornerstone system recommendations, go to idexx.com/cornerstonespecifications and select the **Specifications & Hardware** tab.

Time-Saving Improvements

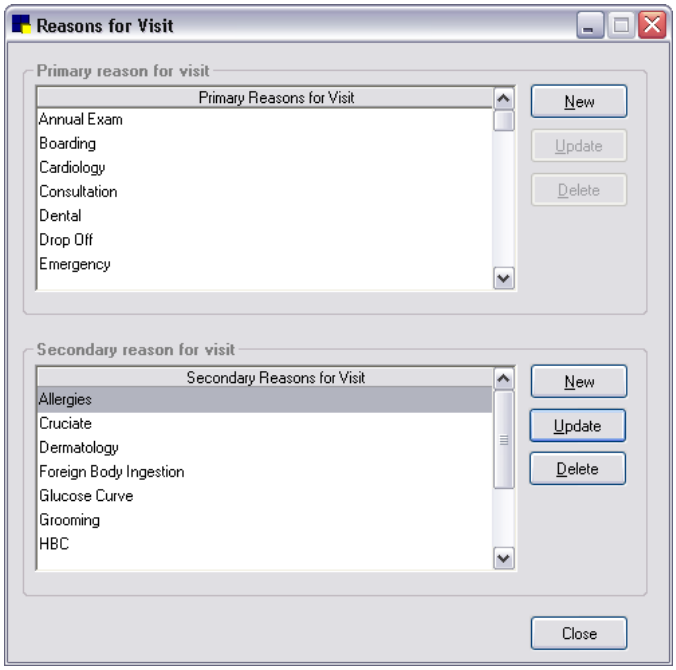
- Cornerstone will automatically process the Sex Modification special action during invoicing if you have assigned **Modified sexes** for applicable patient sexes (in **Controls > Sex**).
- When a client is marked Inactive, all patients belonging to the client will automatically be marked Inactive.
- You now have the option to remove future appointments for a patient if the patient is marked as Deceased.
- When processing a payment with X-Charge payment processing software, if only a portion of the payment is approved, that portion will process and Cornerstone will display a message indicating the amount that was declined so you can process another transaction for the remaining balance.
- Cornerstone now supports use of the Windows® Tablet PC Input Panel and On-Screen Keyboard features to enter data on tablet PCs and other computers with touch screen capabilities.

Secondary Reasons for Visit

The Reason for Visit feature has been expanded in Cornerstone* 8.2 to allow for both primary and secondary reasons for visit, allowing you to provide staff with more information on the patient's visit. Most commonly, the primary reason would be used to indicate the general type of visit, and the secondary reason would be used to provide more detail on the specific problem or procedure. For example, if the primary reason is Surgery, the secondary reason might be Spay/Neuter, Hip replace, Cruciate or Orthopedic.

Option to Set Up Primary and Secondary Reasons for Visit

The Reasons for Visit window (**Controls > Reason for Visit**) now allows you to set up predefined lists of both primary and secondary reasons for visit.

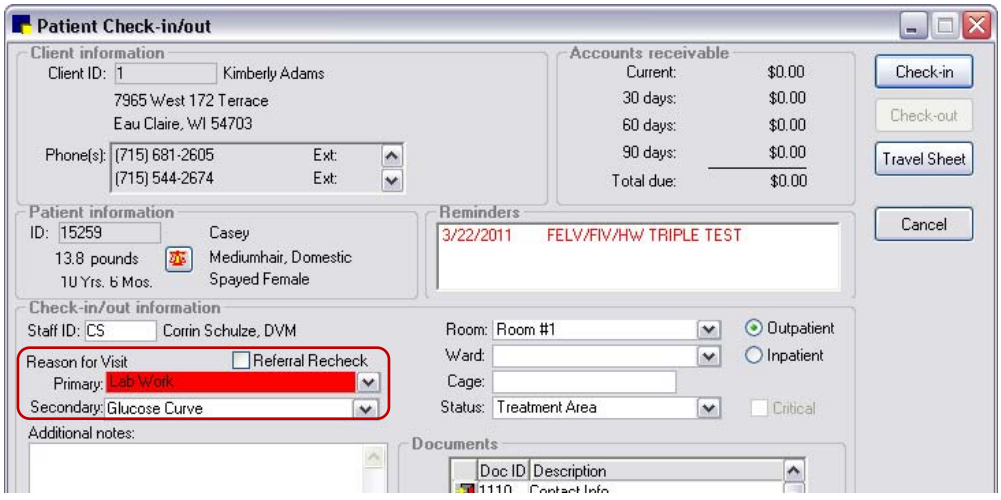


Note: The primary reason for visit color is set in **Controls > Appointment Scheduler > Reasons for Visit**.

Tip: To avoid staff having to select from a long list of secondary reasons, you may want to set up the predefined list with only the most common secondary reasons and instruct staff to free-form type other secondary reasons as needed.

Secondary Reasons for Visit at the Time of Use

At the time of use, a primary reason must first be specified in order to activate the secondary reason field. The secondary reason can then be selected from the predefined drop-down list or staff can type a different secondary reason in the field.



Examples:

Primary Reasons for Visit	Secondary Reasons for Visit
Surgery	Neuter Spay Total hip replacement Cruciate Orthopedic Foreign body surgery Ureterolithotomy
Dental	Dental extraction Routine cleaning Root canal
Medical Exam: Dermatology	Pyoderma Allergy
Medical Exam: Ears	Otitis Extern Otitis Media Yeast Otitis Bacterial Otitis Ear Mites
Medical Exam: Eyes	Corneal Ulcer Conjunctivitis
Medical Exam: Orthopedic	Lameness Osteoarthritis Obesity
Medical Exam: Urinary	Urinary Tract Infection Bladder Stones PU/PD
Medical Exam: Vomiting/Diarrhea	Pancreatitis Gastroenteritis Inflammatory Bowel Disease
Preventative Care	New puppy New kitten Canine Feline Senior canine Senior feline
Lab Work	Blood Glucose curve Liver panel Clotting Factors Kidney panel
Emergency	HBC Poisoning Toxicity Trauma Fight wound

Note: Secondary reasons are not tied to any particular primary reason—at the time of use, any secondary reason can be selected along with any primary reason.

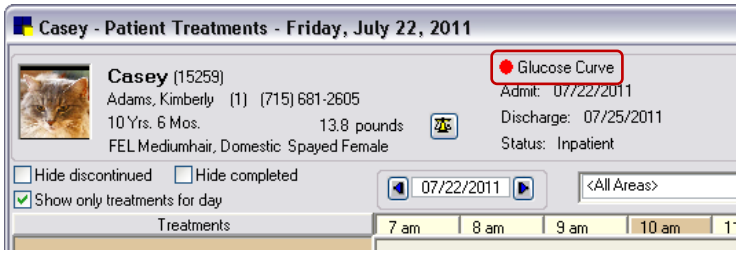
Staff can specify a secondary reason for visit on the following windows in Cornerstone:

- Patient Orders window
- Patient Check-in/out window
- New/Edit Appointment window

The secondary reason for visit displays on the following windows in Cornerstone:

- Whiteboard window
- Patient Treatments window
- Census List window
- Image Request windows
- Schedule for Today window (shows in appointment detail pop-up window)

On the Whiteboard and Patient Treatments windows, a color-coded dot indicates the primary reason for visit and adjacent text provides the secondary reason. If a secondary reason is not assigned, the primary reason text displays.



Note: The primary reason for visit dot color is set in **Controls > Appointment Scheduler > Reasons for Visit**.

Secondary Reason for Visit on Reports

The secondary reason for visit is included on the following reports:

- Appointment Report
- Appointment Report – Summary
- Census Report
- Check-in Report
- Checked-in Census Report
- Client List – Future (Scheduled) Appointments Report
- Whiteboard Patient Treatments Report

Additional Updates

- The Cornerstone Editor's **Send e-mail** button has been changed and now displays as in the Cornerstone Editor (both for text-only and standard display of the Cornerstone Editor).
- Added support for the new TC02 (Bicarbonate) test for total carbon dioxide and anion gap. This test is available on the Catalyst Dx* chemistry analyzer.
- Cornerstone now includes the Diagnostic Code Report with all Cornerstone installations, regardless of whether the Patient Advisor* module is installed.

- Exclusive access to the Cornerstone database is no longer required to perform End of Year processing, which means that End of Year can be completed while others in the practice are using Cornerstone.
- The last used patient ID now correctly populates the Patient Information ID field when you click the Vital Signs/Weight toolbar button.
- When printing prescription labels, Cornerstone now includes a zero (0) before the decimal point if the quantity is less than 1 to make the decimal point more noticeable. For example, .5 will now display as 0.5.
- Addressed issue where laboratory results were not included on the Check-in Report in certain circumstances.
- The 'Print birth date as age' option is now enabled/disabled appropriately based on whether this option is selected in Check-in Print Option defaults.

Introducing Cornerstone Group Manager

Cornerstone* Group Manager is a new service that enables veterinary practice groups to efficiently manage multiple practices from a central location. For groups of all sizes, Cornerstone Group Manager provides a complete feature set for multi-location management, including:

- **Reporting—**Provides ad-hoc and standard reporting capability by practice or in aggregate
- **Data Distribution—**Enables users to share invoice items and pricing with all or some of the practices
- **Patient Record Sharing—**Allows practices to view and/or import medical records from others in the practice group

To learn more, contact your IDEXX Cornerstone sales representative at 1-888-224-4408.

Support: 800-695-2877
Sales: 888-224-4408

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